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ABSTRACT

This manual has been developed to serve two primary purposes: as a text in the original training of company personnel in conference leadership and a guide for the use of trained conference leaders. The conference leader is responsible for creating a situation which makes for complete freedom of discussion. Using the conference, the leader aims to: assemble, select and evaluate facts, get group decisions, and develop and execute plans. He must familiarize himself with the problems, equipment, methods, and procedures confronting conference groups daily. The basic element in preparation for conference leadership is the discussion plan, which serves as a guide for the leader in directing the conference. Conferees should feel each meeting is an accomplishment. Frequent summaries at important points in the conference keep the group thinking and help fix ideas, principles, and conclusions. Five musts for a conference leader are: a good beginning, conferee participation, good questions, progressive discussion and control over the meeting. (CK)

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CONFERENCE LEADERSHIP

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CONFERENCE LEADERSHIP

A text and reference to assist in the development of conference leaders for training programs.

foreword

THIS MANUAL has been developed to serve two primary purposes; as a text in the original training of company personnel in conference leadership, and as a guide and reference for the use of those who are already trained conference leaders. It has been prepared to tie in closely with the course in Conference Leadership presented at the Esso Training Center, but its purpose extends to programs for the development of leaders at any field activities.

Inasmuch as the company's effort in this field is closely tied in with the supervisor training program, and the conference method is the one used universally in that program, examples from supervisor training programs are used to illustrate important points and to show the application of principles. There is no implication, however, that the techniques and principles discussed are in any way limited solely to the training of supervisors.

It is recognized that this manual in no way exhausts the information available in the field, but an effort has been made to represent the best thinking and the most universally accepted principles in the conduct of planned group discussions. The material contained herein is the result of experience gained in the training of hundreds of conference leaders in widely diversified activities.

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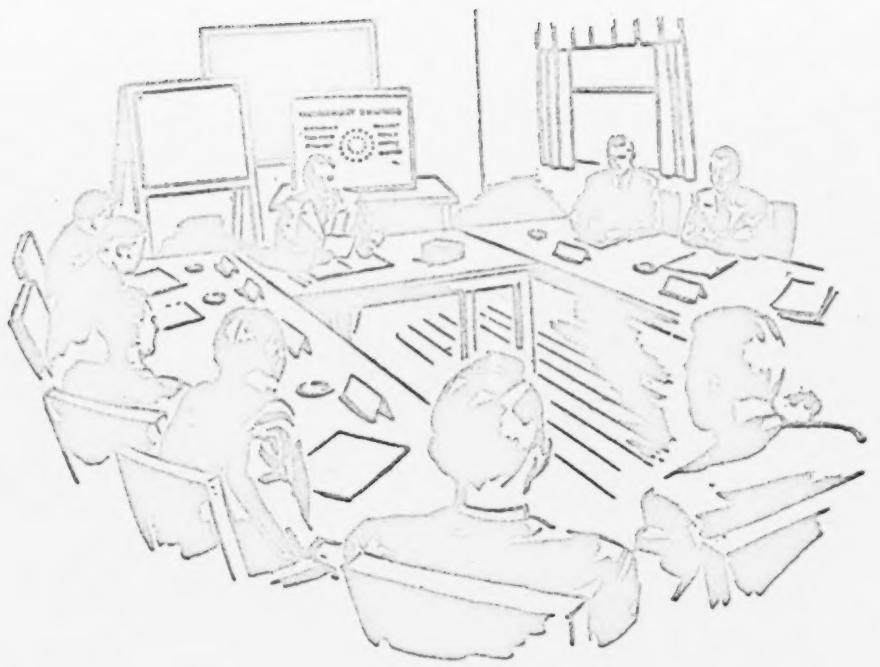
chapter 1



employee training and the conference method

- Training Methods
- Background of the Conference Method in Supervisor Training
- Definition of a Conference
- Advantages of the Conference Method
- Contrast of Conference with Meeting
- Effectiveness in Changing Attitudes
- Use of Other Methods
- Solving the Problem
- Measure of Success
- Conference Leadership

training methods

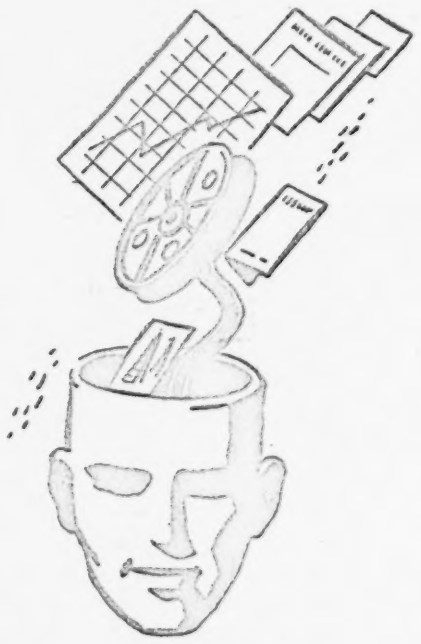
It would be a great mistake to assume that when you speak of employee training in industry you refer to a single technique, a uniform approach or philosophy. For just as there are many methods that may be employed in plant operation and maintenance, just as there are many approaches to office administration, there also are a number of distinctly different methods that may be used in the training of personnel. In any instance, the method that should be used depends on the objectives of the training program and the nature of the subject matter. In all cases, the most suitable method should be chosen.

There are three generally recognized classifications of training methods, the informational, the instructional and the conference methods. They may be used singly or in combination, but it should be remembered that each is a different technique, each poses unique problems and requirements in a training program. Each is profitably applicable to certain types of training needs, relatively unprofitable for other problems.

the informational method

The informational method is generally used when dealing with a group of employees who have little experience; when there is a large group to be taught at one time; or when some general information on new policies, methods, and procedures is to be explained and put into operation immediately. It may be in the form of an address or lecture, or be of a visual nature, using motion pictures, film strips, slides, charts, drawings, and printed materials.

This procedure is essentially a "pouring-in" process. It should seldom be used, and then only when there is no time to present the material in some other way. This technique may be used as part of a conference when it becomes necessary to explain something with which the group is generally unfamiliar.



the instructional method

The second procedure, the instructional, is basically a "learning-by-doing" process under the guidance of a qualified instructor. It too can

be used as part of a conference. It involves either individual or group instruction. It may take the form of a demonstration, with the individual members of the group being given an opportunity to try out the principle or operation demonstrated. One of the most effective forms of job instruction is based on problem solving through explanations and demonstrations by participants under the leadership of the instructor. When applied in accordance with good job-instruction methods, this is an excellent procedure and produces lasting results. In using it, groups must be kept smaller, especially if individual participation by each member of the group is contemplated.

the conference method

The conference method involves a group of people pooling ideas in order to solve their collective and individual problems. It promotes constructive and individual thinking.

The conference as discussed in this text is a "planned conference." It is not, nor should it ever be, a "glorified bull-session." A procedure is outlined; objectives are determined; the conference leader antici-

pates what conclusions may be reached; and he, by careful questioning and controlled discussion, draws these or equally sound conclusions from the group. To use the conference method, the conferees must have a background of information or experience which will enable them to take part in the discussion. If they do not have specific experience in the topic, they may have allied experiences which will make possible a prompt understanding and profitable discussion. It is the conference method which will be considered here.

background of the conference method in supervisor training

During the war emergency of 1917-1918, the need for shortening the time required to train supervisors became acute, and industry attempted to solve it through organized foreman training. As the outgrowth of a research in foreman training at the E. I. Du Pont de Nemours Company by the late Dr. Charles P. (Skipper) Allen, the conference method was applied to foreman training. As Allen said, "These foremen, without knowing it, set up what we now call the conference procedure." Now the conference method has been generally accepted as most effective in the training of supervisors and has also been applied to many other types of industrial training programs.

definition of a conference

On the air, at the town meeting, in government circles, and in most industrial plants, the *conference*, not the "bull-session" or the "cracker-barrel" discussion, has come to play an important part. What is a conference? It can be described as a pooling of experiences and opinions among a group of people who have all had experience related to the problem, or among people who are capable of analyzing the problem from information provided by the conference leader. A dictionary defines a conference as: "The act of consulting together formally; or, an appointed meeting for discussing some topic or business."

The conference method promotes definite, constructive thinking by individuals and the group. A conference requires that those who participate contribute their own experiences and opinions which they think throw light upon the problem. The outcome is usually an agreement upon some general statement or principle, or else a disagreement upon grounds which are understood by those standing on the different principles involved.

advantages of the conference method

Business men long ago recognized the educational value of the conference. They realize, that it has great value in modifying thinking and

attitudes and in extending one's practical knowledge through the experiences of others. Executives know that a conference discussion appeals to those participating, for it recognizes and utilizes what the members of the group already know and also serves to correct mistakes and misunderstandings.

An employee tends to concentrate on his own job and thus restricts his thinking instead of thinking in terms of the company as a whole. After he has been on the job a few years, he is inclined to feel that he is carrying the burden of the entire company, without help from anyone. As a result, he develops little incentive to help others. Experience has shown that participation in well-planned and well-conducted conferences prevents and corrects this type of thinking.

Possibly one of the greatest benefits to be derived from conferences is the development of analytical ability and a questioning attitude. Many inexperienced and untrained employees lack these qualities and tend to base their decisions on snap judgment or emotions rather than on good, sound reasoning. If a supervisor can develop the habit of analyzing carefully every problem that confronts him, his decisions are apt to be sound, and there are likely to be few grievances in his department.

In the planned conference, every problem is analyzed; facts are assembled and studied; pros and cons considered; advantages and disadvantages discussed. Only then are attempts made to arrive at conclusions. This type of training demonstrated at many conferences over a period of time is bound to have a beneficial effect on every employee in attendance.

Another advantage of the conference method is that it will tend to get employees to think more about their jobs. Group discussions will encourage employees to think about their problems and to arrive at practical solutions. The conference helps the employee think straighter, more often and more effectually about the problems he has discussed.

COMPARISON BETWEEN A MEETING AND A CONFERENCE

	Meeting	*Conference*
PURPOSE:	To cover definite information as quickly as possible	To encourage group thinking on mutual problems
NUMBER PRESENT:	Unlimited	Limited to 12-15
SOURCE OF INFORMATION:	Lecture by the leader, reports from members	Participating conferees
PROCEDURE:	Governed by parliamentary rules	Free discussions guided by good conference leadership techniques
RESPONSIBILITY OF THE LEADER:	To maintain order and follow agenda, possibly to lecture	To guide group thinking and secure acceptance of group ideas
SKILL REQUIRED BY THE LEADER:	To know rules of order	To direct group thinking, control discussion, summarize ideas
AGREEMENT BY:	Motions and vote	Sound discussion and group acceptance
SUMMARIZATION:	Minutes kept by secretary	Charts and summaries developed through group discussion

contrast of conference with meeting

The planned conference, with which we are primarily concerned in this manual, is a departure from the formal business meeting, in which someone either addresses the group or conducts the meeting under the rules of "parliamentary procedure." The planned conference involves no lost motion. It quickly brings important problems before the group, the solution of which stimulates the best thinking of everyone present. It is a *thinking process* guided and directed by a competent leader.

effectiveness in changing attitudes

The conference has been found to be quite effective in bringing about changes in thinking and attitudes among conferees. People with simi-

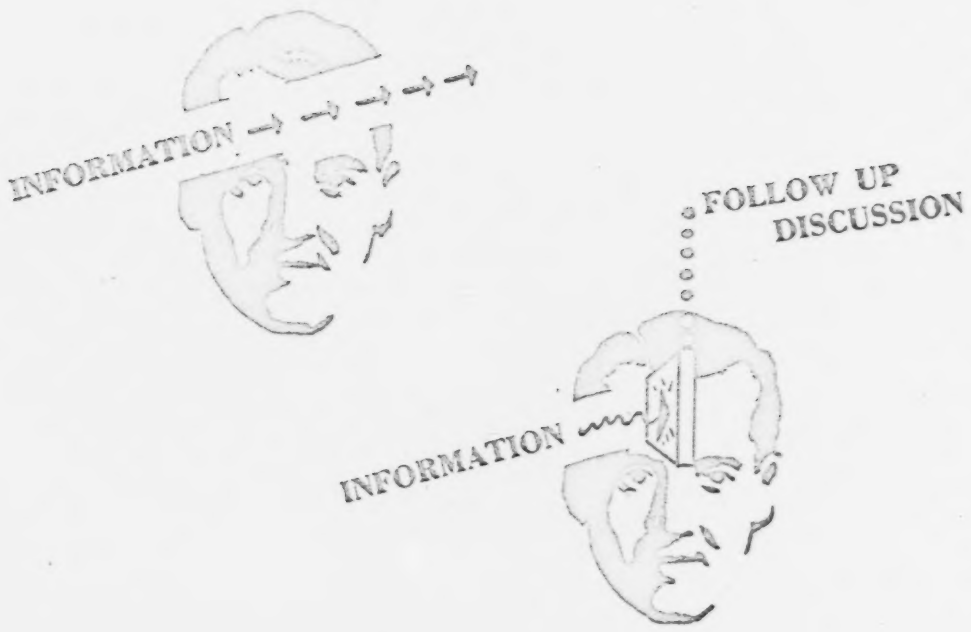
lar backgrounds have varied but over-lapping experiences which, in a conference, are molded into group conclusions. It is inevitable that the results will influence each conferee when he returns to the problem on the job and that the group will tend to approach the problem in a uniform manner.

One important outcome of a conference session is a change in attitude toward persons and situations. An individual's attitude toward any person or impersonal matter is largely determined by his own previous experiences. When he hears the interpretation others have put upon the same situation, he is often willing to adopt what the discussion shows is the group attitude. Thus, when a person who feels that a certain idea is not practical finds that all those in a group whose opinion he values believe that the idea is thoroughly sound, the person's feeling of distrust and doubt is much weakened if not lost.

While group discussions cannot change the attitude of every one on every subject, the average individual tends to accept the attitude of his group, for it is easier and more pleasant to conform than to stand alone. The conference is a most effective agency for giving all who participate a wider concept of the social significance of the experiences being discussed. It may thus change whatever individual attitudes are not in conformity with those of the group as a whole.

use of other methods

In the planned conference the leader is not limited to using one method. There are times when other methods, such as talks or demonstrations, may be used to give information not generally known to those in the group. However, the facts gained from these other procedures are



usually made the basis for a conference discussion on how to use the new information. Thus, a conference program may include a talk on the manufacture of certain equipment used by the conferees, but it should be followed by a discussion on how to use the information when operating or repairing the equipment.

Much of the value of the informational method is lost and principles quickly forgotten unless the group can see how to use new information, can discover the relative importance of a new idea by comparing it with others, and can weigh information in terms of experience to determine its significance and its application. The conference helps the participant to clarify and retain information.

solving the problem

People in conference groups usually are able to see the essential problem in a given situation within their own experience, and then to contribute cases or examples that throw light on the matter under discussion. Under good leadership the common element in a number of different situations is recognized, and a solution is reached through carefully guided discussion. The solution is usually expressed in a general statement of principles or standards. Even though not perfectly or completely stated by the conference leader, this type of statement is practically always recognized by the group, since it is a product of mutual thinking.

In this fashion the conference reaches conclusions in new levels of

thinking for most of the group, conclusions which will help all of them in the future when they meet a similar problem.

Men of practical experience participate in conferences. The validity of their conclusions is thoroughly tested in the light of the wealth of personal acquaintance with the problem at hand. Thus, if care is observed in the application of conclusions to extreme cases, the generalizations developed in conference may be used with confidence by men faced with parallel situations.

measure of success

As an educational procedure a conference is successful to the degree to which all contribute from their own experiences and comment upon the experiences and opinions of others, and to the degree to which all come to understand the significance of group experience and opinion. The educational outcome of a conference is not entirely dependent upon reaching an agreement. A conference which results in a disagreement which all clearly understand may be just as fruitful educationally as one in which all agree.

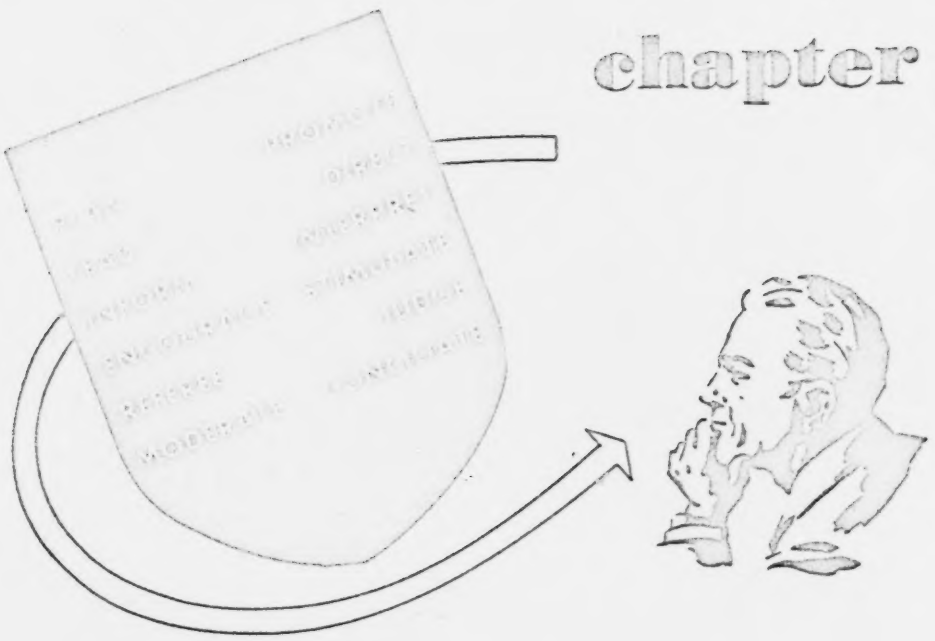
There are a number of conditions that are extremely important to the success of a conference. The conference leader must recognize their importance and continually strive to meet them. Conferences are most likely to succeed over a long period when the following conditions have been well considered and every attempt made to satisfy them:

- ¶ **A qualified conference leader.**
- ¶ **Well-organized and carefully selected conference groups.**
- ¶ **Limitation in the size of groups.**
- ¶ **Proper grouping of employee levels for the purpose involved.**
- ¶ **Sessions of definite length and frequency.**
- ¶ **Adequate conference room facilities.**
- ¶ **Carefully selected and well-prepared conference materials.**
- ¶ **Active interest and support by management.**

Conference Leadership

The effectiveness of the conference method is vitally dependent upon the competence and ability of the conference leader. It is to meet this real need for guidance in the conduct of a conference that training in conference leadership is required. Subsequent chapters will deal with the qualifications and procedures that characterize effective leadership.

chapter 2



the conference leader

- Function of the Leader
- A Stimulator and Director
- Never a Teacher
- Use of Devices
- A Salesman
- More than a Chairman
- The Conference Leader's Aim
- The Good Leader
- Summary

function of the leader

To accomplish maximum results in a given time, the average conference group needs a leader to hold the discussion to the subject. The conference leader's function, however, is not to supply information nor to do the thinking for the group. As conference groups usually have all the information necessary for solving their particular trade problems, and as the members are expected to do their own thinking, the conference leader acts as director and assistant rather than as a lecturer or instructor.

The principal duty of the conference leader is to assist the conference to accomplish its purpose. To do this the leader helps the group find and define the problem and then guides and controls the discussion so that it is constantly directed toward it. He may start a discussion by putting a question or stating a case. At times he may find it necessary to encourage the group to contribute more experiences, especially those of a different kind, to get at the problem from another angle. If the group does not see the essential points of similarity in the cases being discussed, or fails to see that the discussion is getting away from the point, he may need to analyze what has been done and thus redirect the discussion along desired lines.

When the time comes, he helps to state the principle, rule, or explanation which seems to be the concensus of the group in dealing with the problem. In providing this help, the conference leader is assisting group thinking, not doing the work himself.

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a stimulator and director

The conference method of instructing does not require an expert in the subject being discussed but rather an expert stimulator and director of discussion. Any man who can be a good impartial chairman and manager of disputing men, can keep them cool and friendly, has the essential requisites for success as a conference leader.

Knowledge of the subject is worth while, but it is not as important as clear, impartial thinking and the ability to exercise skillful control of men.

As a leader, he has the function of seeing that everyone contributes and that no one monopolizes the time of the group. He also controls the intensity of the discussion lest feelings be aroused which interfere with clear thinking. If a member of the group tries to show up other members it is the leader's task to handle all the parties to such a situation, so that the case is seen in its true relation to the problem being discussed.

never a teacher

From what has been said about the conference method of instruction and about the principal responsibilities of a conference leader, it is clear that a conference leader is never a teacher or lecturer. He does not tell the group how to think; he does not tell the group what to think; he does not dictate the results of their thinking; and he does

not have a program of his own to put over. Most of all he does not set himself up as an authority on the matters being discussed, nor permit others to appeal to him to settle their disputes. He does not enter into the discussion save to summarize or to redirect it; neither does he correct misstatements made by the members of the group, though he may call attention to a questionable point or statement so that the group will not miss the imporance of a situation or accept a significant error as truth.

The conference leader must avoid talking too much. Experience has shown that the more a leader talks the less the members of his group will talk. If the leader is well prepared, his material carefully selected, his questions well planned, a minimum of talking on his part will be necessary.

use of devices

To help the conference make progress, the conference leader uses a variety of devices. He puts written summaries on the blackboard, makes rough diagrams, or writes out the various points made. Indeed, much of the work of a conference is done with the visual aid of analyses, outlines, and rough graphs put on the blackboard or other writing surface by the group leader, so all can have constantly in mind what has been covered or agreed upon. A conference leader has a number of other technical devices for facilitating the work of his group which will be described as this text progresses.

a salesman

The conference leader must sell himself and his program to the employees and management. People do not as a rule accept training easily. In many places "training" has earned a poor reputation, perhaps because of the inferior quality of training given in the past. The leader must break down this prejudice and maintain high standards in his own program to insure its acceptance and success. The success or failure of a conference, or of an entire training program depends in great part upon the quality of leadership.

more than a chairman

It is obvious that the conference leader is far more than a chairman who carries out a set program that has been arranged for him.

Before each conference, he develops a working outline to control and guide the thinking of the group, so that the members will pool their experiences; express their viewpoints; and discover what they know, what they do not know, and what they should know. The conference leader has a vital part in the educational process.

THE CONFERENCE LEADER HELPS THE TRAINEE:

¶ Become more receptive to new ideas and new methods.

¶ Recognize new and added responsibilities.

¶ Better understand new problems.

¶ Understand and appreciate the viewpoint and experience of top management.

¶ Become more open-minded.

¶ Better understand his workers.

¶ Organize his thinking.

¶ Become more management-minded and cost-conscious.

¶ Express his viewpoint and experience to top management.

the conference leader's aim

The conference leader must create a situation which makes for perfect freedom of discussion. If he fails in this, the chief value of the conference may be diminished or entirely lost. In attaining this perfect freedom of discussion he must avoid the bull-session and the gripe-session. He must not permit the conference room to become a place to which may be brought all petty gripes and grievances, nor can he become the mediator between the employee and top management for the settlement of petty grievances. He must always consider the greatest good for the greatest number. Through the medium of the conference the leader aims to:

1. *Assemble facts*
2. *Select and evaluate facts*
3. *Get group decisions*
4. *Develop plans*
5. *Execute these plans*

the good leader

Behind every good conference or group discussion is to be found the guiding hand and spirit of the good leader. It is he who helps the group form a clear definition of its problem and directs the discussion toward a solution. During this process he may need to assume many roles. He must plan, promote, lead, direct, inform, interpret, encour-

age, stimulate, referee, judge, moderate, and conciliate as occasion demands. He must do all of these without making it appear obvious that he is doing them. He does this by exercising the qualities of good leadership. Let us review what these are:

1. HE MUST BE A CLEAR, RAPID THINKER

It is not necessary that the leader be *the* most rapid thinker in the group, but if he is to command respect and confidence, he must be among the most able in this respect. Good preparation will aid greatly.

2. HE MUST POSSESS EASE OF EXPRESSION

This means that he must have the ability to use language freely, express thoughts clearly. As a director of the group thinking of others, the leader must be able to help others express, in ordinary, clear language, thoughts which they find difficult to put into words. He must be able to phrase and rephrase questions and topics to carry the thinking of the group along. He must be able to select good words in stating the problem, in summarizing progress at various intervals, and in stating concisely the results of the conference.

3. HE MUST POSSESS ANALYTICAL ABILITY

He will be expected to clarify problems. This means, that he must analyze and point out the various angles to be considered in points of discussion. Throughout the discussion he must be actively engaged in analyzing the contributions that favor a certain type of solution; those that oppose it; others that favor another kind of solution; those that oppose this; and so on, until the stage is reached where his efforts, being pooled with those of his group, result in a "group idea." The leader must be able to separate the essential and worthwhile from the helter-skelter array of contributions that are offered. He must see in each the part that may be used in building the bridge that will ultimately lead to the conclusion.

4. HE MUST BE IMPERSONAL

He must assume an impersonal attitude. He must see that each person receives a courteous hearing and fair treatment by the other members. Even though the leader himself may not favor certain individuals or certain viewpoints, he must not permit his personal feeling to get the better of his judgment.

In presenting his viewpoint to the group he must be careful to inform them that it is a personal viewpoint, and that he is, for the present speaking for himself, and not as the conference leader.

5. HE MUST NOT LET PREJUDICE INFLUENCE HIS LEADERSHIP

The leader who takes sides on any issue will so antagonize those members against whom he is siding as to make further cooperative discussion impossible. He will defeat the real purpose of the Conference by closing the doors to further discussion.

6. HE MUST BE PATIENT

The leader must have patience with the stumbling efforts of members. Many will find it difficult to think out loud, and many others will find it hard to express their thoughts before the group. What such members need from their leader is encouragement and help in expressing their thoughts. This requires patience.

THE CODE OF THE CONFERENCE LEADER

I will:

- Frankly recognize my own limitations and do my utmost to improve my qualifications.
- Under no circumstances violate a confidence.
- Never underestimate the other person's point of view.
- Be open-minded about the other fellow's job, viewpoint and experience.
- Believe in the job of conference leader.
- Give credit where credit is due.
- Remember constantly that the people in the conference groups are worthy of every consideration and respect, and deal with them as fellow men.
- Stimulate and develop thinking and expression.
- Try to listen more than talk.
- Avoid prejudices.
- Minimize my own personal experience and achievement.
- Remember that the success or failure of the entire training program rests with its leaders.

7. HE MUST BE TACTFUL IN HANDLING PEOPLE

The tactful person possesses the ability to deal with others without offending them. Where strong prejudice enters into the discussion it takes the utmost of tactful leadership to prevent it from growing into bitterness.

8. HE MUST HAVE POISE AND SELF-RESTRAINT

The leader must instill in his group a feeling of enthusiasm, courage, and confidence in his ability to lead. He must restrain himself from being too much in the foreground, dominating the discussion, expressing his own opinions too freely, and making speeches.

9. HE MUST POSSESS A SENSE OF HUMOR

Nothing can quite take the place of a good sense of humor in relieving tension and getting free expression. It will get him out of many a ticklish situation and hold the interest of the employees. A good story often helps to drive home a point without hurting anyone's feelings. When serious discussion is under way, however, it should be kept as such and respect for the thinking group should prevent interruption by humorous or witty aids.

summary

1. The conference leader need not be a super-man type of individual, but he should command the respect of the employees with whom he deals.
2. He should have a first-hand knowledge of the job and problems of the employees.
3. He should speak the language of the employees and use expressions most commonly used by all of them.
4. He should be interested in the employees, be sympathetic and understanding.
5. He should develop the ability to stimulate employees to do their own thinking and to express their own ideas.
6. He must learn to ask questions that are thought-provoking and require more than a "yes" or "no" answer.
7. He must possess a good sense of humor.
8. He must be quick in his reactions—quick to analyze, quick to observe, quick to think—always a jump or two ahead of the group.
9. He must be tactful and patient, diplomatic at all times, and firm when necessary.
10. He may lack experience at the start, but he should be able to learn by experience and be interested in improving himself as a leader.
11. He should strive to develop a personality that appeals, attracts, and wins confidence, and respect.

chapter 3

preparation for conference leadership

- General Preparation of the Leader
- Preparation for Conferences
- Preparing a Discussion Plan
- Check List for Conference Leader Preparation and Planning

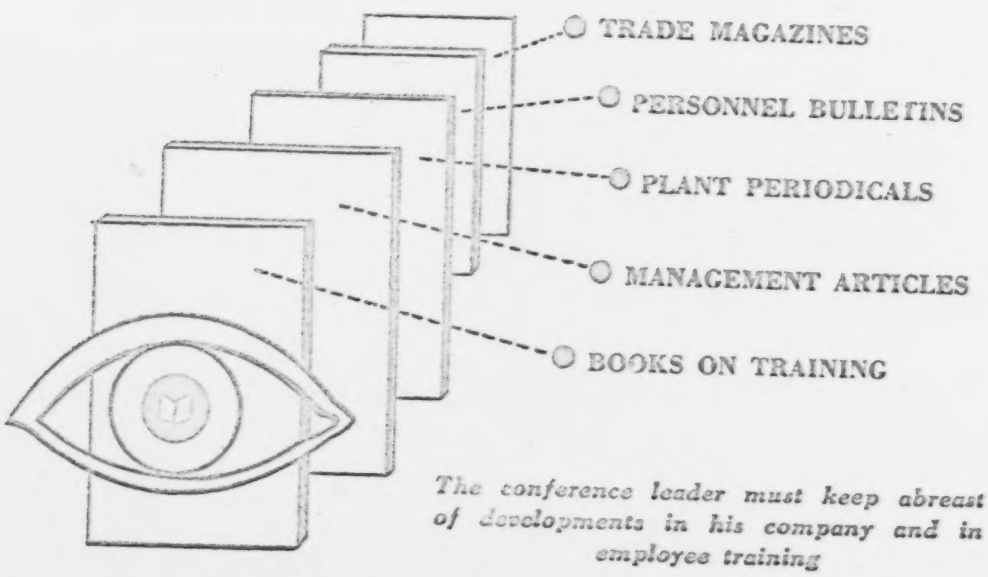
A conference is only as good as its leader. The leader is only as good as the preparations he has made for conducting the conference. The occasional use of a device to record a conference, so that the leader can play it back and listen to himself in the role, is an excellent method of self-improvement.

General preparation of the leader

Too much emphasis cannot be placed upon the preparation of the conference leader for the responsibility of conference leadership in general. Into this preparation enter the man's qualifications, background, experience, previous education, general knowledge and ability, and familiarity with the specific topics to be discussed in the training program.

The successful leader familiarizes himself with the problems, equipment, methods and procedures which confront conference groups in their daily work. He makes every effort to keep informed on current ideas and activities in the field of conference leading and employee training. This means a considerable amount of study and reading—trade magazines, personnel bulletins, plant periodicals, management articles, supervision books, and magazines. Conference leading is an art, a skill that requires careful application to be mastered.

The leader should never be satisfied with anything but a star performance. He cannot put on such a performance without careful preparation. Preparation means the same thing to the conference leader that it does to the theatrical star—study and rehearsal.



The conference leader must keep abreast of developments in his company and in employee training

preparation for conferences

Certain planning on the leader's part is necessary before every conference begins. This pre-conference planning includes:

1. Acquiring a thorough knowledge of the subject matter.
2. Preparing a discussion plan.
3. Thoroughly acquainting himself with the use of his plan.
4. Checking to make certain sufficient materials are available for distribution to conferees.
5. Making sure the conference room facilities are in order.
6. A study of conference personnel to determine an effective approach based on group characteristics.
7. Predetermining ways of arousing and maintaining maximum interest and enthusiasm.
8. Anticipating situations and problems which may arise.

preparing a discussion plan

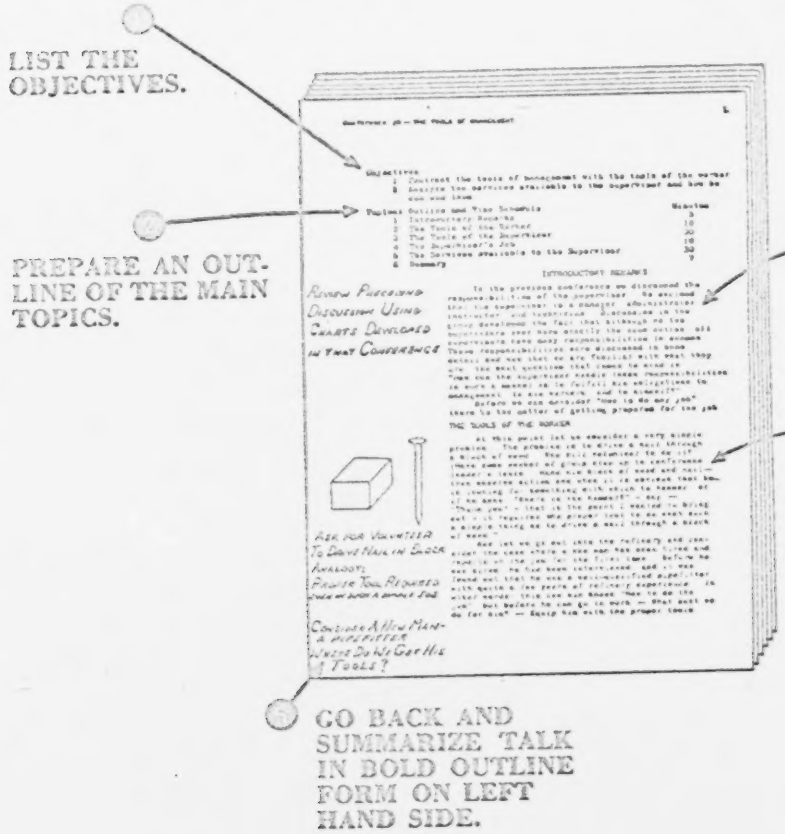
The most basic and most important element in preparation for conference leadership is the discussion plan. It is the foundation for thorough coverage of the subject matter and a properly managed conference.

To someone who has not himself lead a conference, leadership appears to be a fairly easy task. This is a delusion, and one purposely created by the skilled leader, part of whose job is to deemphasize his own importance, make his role seem effortless and casual.

Actually, extremely careful planning is necessary, because it is in the leader's guidance and direction that a conference becomes successful, produces results. He must be familiar with the subject matter, must anticipate situations and problems which may arise, must have some sort of a time-table for effective utilization of time, and most important of all, he must have thought out the most effective ways of introducing material, ways that will provoke discussion and guide thinking toward the planned conclusions.

There are many ways to prepare a discussion plan: Actually it consists of nothing more than a guide, prepared by himself, to keep the leader on top of his subject throughout the conference. It is a device to allow him to do a lot of his thinking beforehand, rather than be faced with the need of improvising his presentation on the floor. Such a plan should suggest the objectives of the conference, the logical sequence of subject matter, key points to be covered, questions to be asked, aids and materials to be used, and conclusions that might be reached. It should be a working guide, allowing a great deal of flexibility, not a script or a detailed set of notes to be followed rigidly during the meeting. It is a reference, to be consulted only as often as necessary.

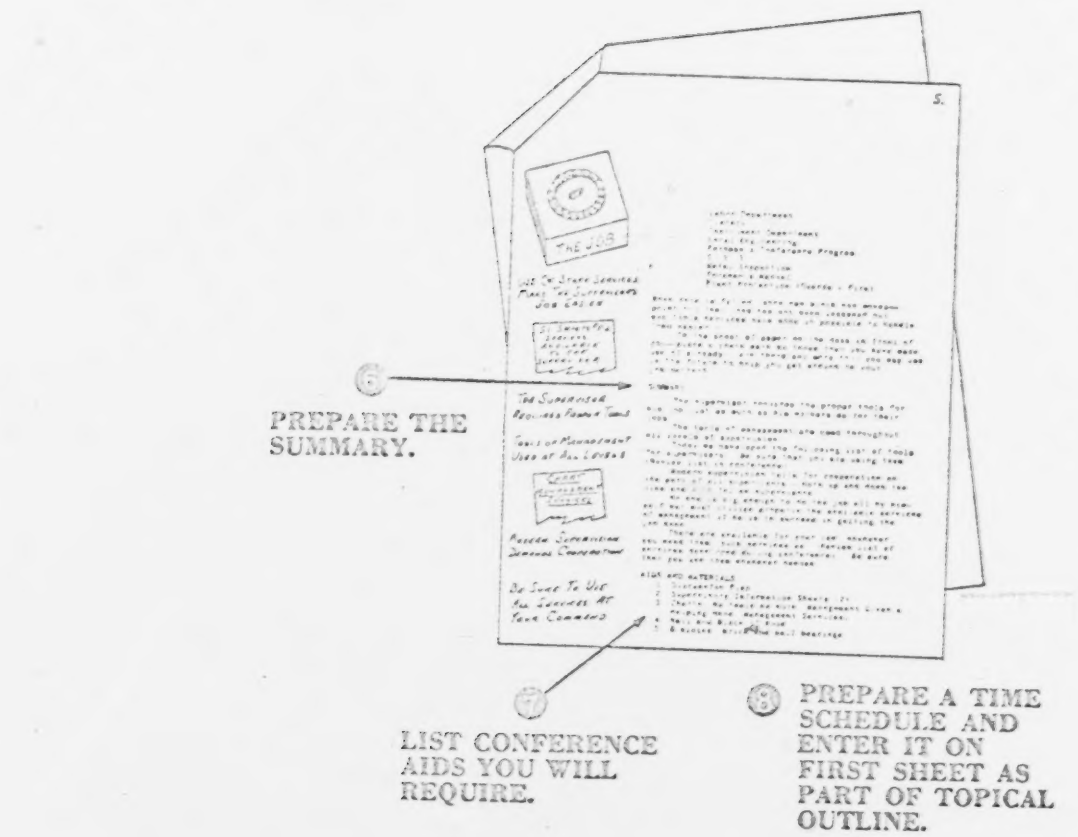
A TYPICAL DISCUSSION PLAN.....


LIST THE OBJECTIVES.
PREPARE AN OUTLINE OF THE MAIN TOPICS.
DRAFT YOUR INTRODUCTORY REMARKS.
CONTINUE WITH DRAFT OF YOUR TALK, SETTING DOWN ALL NECESSARY INFORMATION.
GO BACK AND SUMMARIZE TALK IN BOLD OUTLINE FORM ON LEFT HAND SIDE.
Objectives
Topical Outline and Time Schedule
INTRODUCTORY REMARKS
Room Placement
Discussion Using
Charts Developed
in Your Conference
THE TOOLS OF THE WORKER
Ask for Volunteer
To Drive Nail in Block
Analogy:
Provide Tool Required
Show How With a Single Tool
Compare A New Man
A Mechanic
What Do We Give Him
Tools?

The adjoining illustration is an example of the two-column discussion plan, one that has been used with considerable success. Its actual preparation helps the leader learn his subject; it is easy to follow, and yet it makes detailed information available to the leader during the conference if he should need it.

In setting up this type of a plan, the leader should first establish his objectives and set them down on paper. He should then prepare a very brief topical outline of his subject matter to determine the scope of the conference.

Next, using the right hand side of the page, he should write up a fairly comprehensive outline of what he expects to do and say, including all of the information necessary for a full discussion of the


PREPARE THE SUMMARY.
LIST CONFERENCE AIDS YOU WILL REQUIRE.
PREPARE A TIME SCHEDULE AND ENTER IT ON FIRST SHEET AS PART OF TOPICAL OUTLINE.

problem. This should include his introductory remarks and a projected summary of the results of the discussion.

From this comprehensive outline he should prepare his working outline, using the left hand side of the page. Here he should simply use key words and phrases, questions, illustrations, and references to the use of conference aids. This side is merely to remind the leader of what he must do in the course of the discussion. It is simply an abbreviated version of the right hand side.

Having completed his development of the subject matter, he should then establish a time schedule and append it to his original topical outline. He should also summarize and list all of the conference aids included in his plan as a reminder of the materials he will have to prepare and take with him into the conference.

CHECK LIST

for conference leader preparation and planning

Have you	*Yes*	*No*
1. Fixed in your mind the objectives to be attained through the conference discussion?	___	___
2. Secured, prepared, or thoroughly familiarized yourself with the necessary conference aids:		
(a) Charts ready?	___	___
(b) Case studied prepared?	___	___
(c) Check sheets to be distributed ready in sufficient quantities?	___	___
(d) Demonstrations predetermined?	___	___
(e) All special materials obtained?	___	___
(f) Films to be used previewed and a plan made for their use?	___	___
3. Prepared your opening talk?	___	___
4. Carefully studied your conference outline?	___	___
(a) Determined the important points to be emphasized?	___	___
(b) Considered anticipated responses and group reactions?	___	___
(c) Determined points at which quick summaries will be made?	___	___
(d) Considered experiences and stories to be used for emphasis?	___	___
(e) Determined ways and means of getting conferee participation, stimulating thinking, and creating interest?	___	___
(f) Considered what the summary of the group's thinking might be?	___	___
5. Planned carefully to be sure adequate time has been allotted?	___	___
6. Notified everyone concerned of time and place of meeting?	___	___
7. Checked physical requirements for conducting meeting?		
(a) Blackboard or chart paper available?	___	___
(b) Seating arrangement conforms to good conference procedure?	___	___
(c) Facilities for showing films in readiness?	___	___
(d) Ash trays provided if smoking is permissible?	___	___
(e) Chalk, crayon, scotch tape, thumb tacks, erasers, paper, pencils, etc., on hand?	___	___
(f) Ventilation, heat, light, conferee comfort adequate?	___	___

chapter 4

conference procedure

- The First Conference
- Conference Introduction
- Suggestions
- Common Understanding
- Topic and Purpose
- Definition of Terms
- Keeping on the Subject
- Getting Full Participation
- Promoting Group Relationships
- Summarizing
- Five Key Points

the first conference

The success of a series of conferences depends a great deal upon the first meeting, as first impressions are very important. If it is improperly conducted it may make the rest of the program very difficult to put over. A poor first conference sets up a handicap which jeopardizes the whole program and presents an obstacle to success which is difficult to overcome.

However, if the first conference is well conducted, the biggest step towards selling the whole program has been taken.

The future acceptance of the conference idea as well as the intelligent and wholehearted cooperation of the participants depend upon this first meeting.

It is a good plan to have someone from top management introduce the leader at the first session. If this is impossible, the leader should secure a letter from top management endorsing the program. This letter should state the purpose of the program and give a clear indication of how top management feels about the meetings and the program in general. The letter should be read to all groups by the leader as he meets them for the first time.

It is suggested that at the first conference the leader's introductory remarks should touch upon:

- The individual's job today—more difficult, increased responsibilities.
- The new and more difficult problems faced by top management, which have to be passed down the line.
- The purpose of this program.
- That everyone is expected to participate freely.
- A mutual exchange of ideas will improve the quality of work in the plant.

During the first conference the leader should feel out the group carefully, analyzing the attitudes and personalities with which he is working. No two groups of people are the same, and it follows logically that the same methods that have been successful with one group might fail with another. The leader should determine the appropriate approach at the first meeting.

conference introduction

The conference leader should introduce himself by writing his name on the board for all to see and indicating by what name or nickname he desires the group to address him.

Example: My name is "John Smith." All my friends call me "Jack." This is to be a very informal meeting so I would prefer to have you call me "Jack."

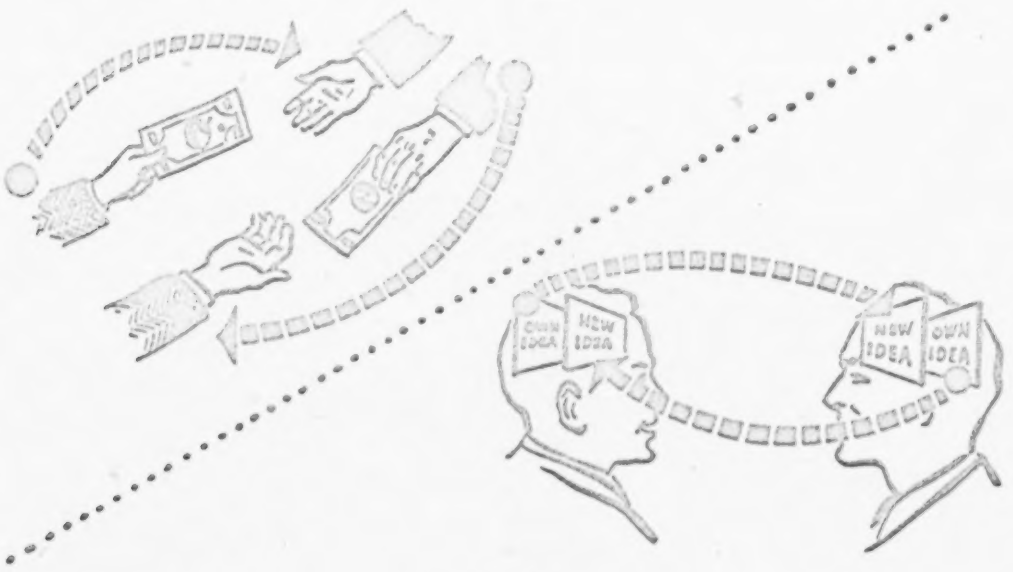
It is a good plan to pass out a 5 by 8 inch card or piece of paper to each conferee. Ask him to fold it lengthwise to form a sort of tent, each side of which will now be 2½ by 8 inches and which will stand in front of each man. Instruct each conferee to PRINT, in large letters, his full name, nickname and department on both sides of the folded paper, with a heavy black pencil or wax crayon. In this way, all present can catch the name of each conferee at a glance.

suggestions

Under some conditions conference leaders have used the following device very successfully:

Each employee is asked in turn to give his years of experience. The figures are written in a column at the left side of the blackboard, and added. The leader then compares his own experience with this total to show why he cannot assume the role of an expert or authority and emphasizes what the pooling of these years of experience can mean in solving the many problems confronting the group.

The idea of pooling experiences and the benefit derived therefrom can be emphasized further by asking "If I trade one of you one dollar for another, how many dollars will each of us then have? If I trade you one idea for another idea, how many ideas will each of us have?"



common understanding

After the leader puts the group at ease with some form of greeting, he should stress these points to assure from the start that there is no misunderstanding about the nature or purpose of the program:

- that the conference leader does not consider himself an expert nor an authority. He is not going to tell them how to run their jobs. He cannot answer all the questions which will be raised nor offer solutions for all the problems presented.
- that the conference leader's chief function will be to raise questions and problems, to keep the discussion on the topic being considered, to act as chairman, and to help the group summarize its thinking and arrive at conclusions.
- that every employee in the group can help by:
  (a) Entering into the discussion and speaking freely, giving the group the benefit of his viewpoint and experience.
  (b) Giving others a chance to express their opinions.
- that the leader has no special personal ideas to present to the group. All decisions will represent the collective thinking of the group.
- that only one person should talk at a time. Private conversation should be avoided, and common courtesy extended to the man who has the floor.
- that opinions should be expressed briefly.
- that differences of opinion are to be expected, but no one should get angry if others differ with him.

topic and purpose

After these preliminary details have been accomplished, the leader should announce the topic to be discussed and the purpose of the meeting.

As the topic is being announced it should be written on the blackboard, plainly enough for everyone to see.

Since much of the conference success depends upon the interest originally aroused, introductory remarks concerning the topic to be discussed must be carefully thought out.

Some methods of arousing interest at this stage are to have an appropriate saying, slogan, or catchy phrase, or a brief outline of

HOW THE CONFERENCE LEADER CAN DEVELOP AND CONTROL GROUP DISCUSSION

Carefully planned questions.
Creating interest through the use of case studies, films, charts, check sheets, etc.
Encouraging expression of opinions by the conferees.
Assembling facts and charting them.
Evaluating facts.
Determining a plan of action.
Listing advantages and disadvantages.
Using demonstrations.
Asking for examples to support statements made.

the topic on the blackboard; or perhaps to weave the introductory remarks around a current incident, a shop operation, or a well known personage. It is very important that introductory remarks should be brief, to-the-point and designed to start group thinking.

An example of an introductory remark follows:

> "A great deal depends upon the supervisor and much is expected from him."
>
> "In carrying out your duties, you are a supervisor, a manager, and an instructor. As a supervisor, you see, as a manager you plan, and as an instructor you teach. You cannot spend too much time in any one of these phases of your job. You must be able to evaluate your duties so that you can determine which are most important and which should have the most time. As a supervisor you have a large force to supervise; as a manager you have to plan the work of many men and organize production methods; as an instructor you have inexperienced workers to train and place.
>
> "As a supervisor in a busy plant, you have probably found that new duties have been added to your job, old ones increased."

definition of terms

Define any new or controversial terms. This prevents argument and disagreement on issues which might arise as a result of the misunderstanding of terms. It is good policy to write these definitions on the blackboard.

Keeping on the subject

Starting the meeting on time, keeping it moving on schedule, and closing on time are important considerations. They mean sticking to the topic under discussion. Nothing should be tolerated that will get the meeting off the subject. However, sometimes a member of the group will do just that. It is then up to the leader to nip that discussion in the bud, and get attention back to the main topic. Sometimes a leader may forestall sidetracks by asking a conferee if the point he has started to present has a direct bearing on the subject under discussion. Another way might be a statement like the following, which might even make the conferee feel important, build him up:

> "That's a very interesting question," or "That's a very important problem," "but we must put it off until some other conference. We haven't time to do it justice now and it's a bit off the subject. I'm sure we will be able to discuss it more fully and much more to your satisfaction if we save it for a more appropriate time. Thank you, though, for bringing it to our attention. Bring it up again when we are on that subject."

Then swing back to the planned discussion.

Getting full participation

To the leader, getting full participation means two things:

> *1. Making sure that each member of the group takes an active part in the conference—says something—does something—enters into the discussions.*
>
> *2. That he himself should fade into the background so that the conferees do most of the work.*

Both of these are means to the same end—getting results from the conference.

Experience shows that when a man takes part in a meeting—contributes something to it—he feels that it is his meeting. He is more likely to accept the ideas and suggestions brought out—and put them to work on his own job.

To get the conferees to carry most of the load the leader should make frequent use of the device of getting an individual's opinion, and then throw out a question or statement based on that opinion.

Sometimes it may be necessary or desirable to ask more than one man for his opinion, perhaps ask several in succession, to add various ideas and experiences. For example: to get Jim Brown to express his ideas concerning a given topic or problem. When he has finished, without commenting himself, the leader asks Joe Dokes for his opinion

by saying, "Joe, you've had a lot of experience along this line, what do you think about Jim's idea?"

Frequently, in this manner, it is possible to stir up interesting discussions because not all persons think alike. This is fine. It shows that the members of the group are really thinking. Just keep control of the meeting. Allow only one man to talk at a time. Insist that each man keep strictly to the subject and try to get each man to back up his opinion by recounting experiences from his daily work.

Still another way to put the load on the conferees is neither to answer a question nor voice an opinion, unless it is absolutely essential to do so.

If someone asks a question, repeat it. Then turn to other members of the group and ask, "What do you think about that?" And—if it is worth while—get other members to confirm the answer, or to correct it.

Here is the thing to remember:

The leader is not there to answer questions. He is there to ask them; and, if necessary, to emphasize the correct answers.

He is not there to discuss topics. He is there to draw out the ideas and experiences of the members of the group, and to summarize conclusions.

promotion of group relationships

The most effective discussions are secured when the members are sufficiently acquainted with one another and with the leader so that they feel entirely free to participate. The experience of a great many leaders is that it takes between two and three meetings before the members of the group fully accept the idea of conference discussion. It apparently makes no difference what the group is told about the nature of the meetings. The only explanation of this seems to be that they are convinced by the leader's actions rather than his words. The factors which affect the relation between the group and the leader seem to be as follows, in the order of their importance:

1. The degree to which the leader refrains from assuming authority through the expression of his own opinion.
2. The manner in which he treats the responses offered, that is, his sincerity and friendliness even in difficult situations.
3. The skill in his use of the various techniques, measured by the degree to which they do not become so obvious that they are recognized by the group.
4. His ability to stimulate thinking and arouse interest.

Summarizing

Conferees should leave every conference with the feeling that something has been learned or accomplished; conclusions arrived at should be clear and fixed in the conferees' minds. If this is to be accomplished, sufficient time must be allowed for making this summarization of the conference high spots. Failure to do this results in the criticism that nothing is ever settled in the conference meetings; that conferees leave in a more or less confused state of mind.

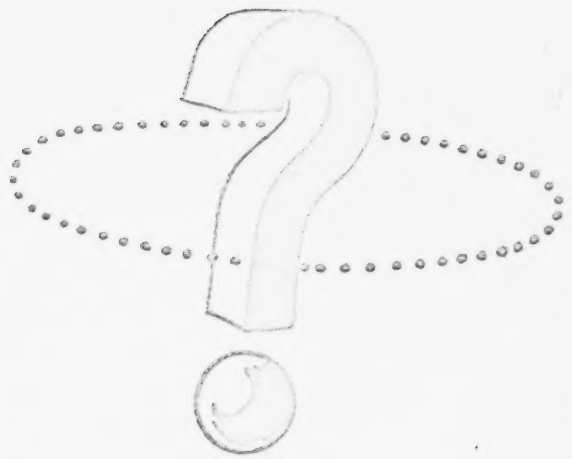
A short, clear summary made with the assistance of the group makes for a clearer and more lasting impression.

In the summary the conference leader reemphasizes and restates the important points, ideas, and decisions arrived at by the group. The summary also gives the leader an opportunity to stress the importance of putting conclusions into practice wherever and as soon as possible.

The summary need not be limited to the close of the conference. Frequent summaries at important points in the conference discussion keep the group thinking; help fix ideas, principles, and conclusions; prevent the leader from getting off the topic under discussion; and assure proper attainment of the conference objectives.

FIVE KEY POINTS

1. *Be prepared—know your topic; be familiar with your outline.*
2. *Get off to a good start.*
3. *Stick to your topic—keep the purpose of the conference uppermost in your mind; strive to attain the objectives of the conference.*
4. *Get full conferee participation—make conferees feel that it is their meeting; establish the idea that the success of the conference depends upon their participation.*
5. *Summarize the discussion—your conferees should leave with the feeling that something has been learned or accomplished; conclusions arrived at should be clear and fixed in the conferee's minds.*



chapter 5

the use of questions

- Types of Questions
- The Direct Question
- The Overhead Question
- Hints on the Art of Questioning
- Questions in Lieu of Statements
- Key Words for Questions
- Summary of the Use of Questions

types of questions

The use of questions as a means of directing and stimulating discussion is one of the most effective techniques used by the conference leader. Various types of questions are recognized, such as leading, suggestive, or thought-provoking questions. Many of these may be addressed to the group as a whole, many to individuals. They may also be general or specific as to the nature of response desired. Whatever the type of question may be, the person addressed, or the nature of response desired, the most effective are those which cannot be answered by "yes" or "no." The "who," "what," "when," "why," "where," and "how?" questions are preferred. The manner in which the question is asked is of the greatest importance. To be successful the conference leader must develop skill in asking questions.

Questions are very important tools which should be carefully selected and skillfully used. The technique of intelligent and purposeful questioning is an art.

The Uses of Questions

1. To open discussion.
2. To stimulate interest.
3. To provoke thinking.
4. To accumulate data.
5. To get individual participation.
6. To develop subject matter.
7. To determine a member's knowledge.
8. To change the trend of discussion.
9. To arrive at a conclusion.
10. To terminate or limit discussion.

the direct question

The value of the direct question is based on the fact that certain types of people are sometimes timid and reluctant to state their opinions or the reasons for their points of view. One good use of the direct question, then, is to ask the individual not taking part what he thinks about the matter under discussion. The implication that he has had special experience or some special knowledge of value to the group appeals to his job-pride or to his self-respect and offsets his timidity or reluctance to engage in the discussion. When a person's mind is obviously wandering, the direct question brings his mind back to the topic under discussion. It acts as a sort of jolt to get his attention.

TYPES OF QUESTIONS

	Example
1. Leading Questions suggest answers	Would you fire or transfer the man in this case?
2. Factual Seeking facts, data, information	What is the cost of anger-prone supervision?
3. Direct Directed at specific person	Mr. Jones, what are the 3 C's?
4. General or Overhead Directed at entire group, anyone to answer	What is the meaning of good supervision?
5. Ambiguous Two or more meanings	Is it a good policy to fire a worker?
6. Controversial Two or more answers	Are leaders born or made?
7. Provocative To incite to answer	What do you think of the statement, "Most supervisors drive their men too hard?"
8. Re-directed Directed at leader but returned to the group	*Member A:* What is meant by "seniority"? *Conference Leader:* "Mr. B, how would you define 'seniority'?"
9. Yes and No. Calls for Yes and No answer	Did you attend the conference?
10. Why, When, Where, and What Follows Yes and No type. Used alone to stimulate thinking.	What kept you from attending the conference? Why is promptness important?

A properly chosen question frequently can bring the thinking of the group back to the discussion or the individual's thought back to the point. The following case illustrates this point: an individual member of the group is talking about something irrelevant to the question under discussion. A direct question, such as "How does that tie in with the problems we are discussing?" will get him to see that he is "just talking" or that he is not talking to the point.

The overhead question

The overhead or general question is a question addressed to the entire group, not to an individual member of the group. An illustration of an overhead question is: "What do you fellows think about overtime for foremen?" The overhead question is used chiefly to promote group thinking, to start discussion, and to bring out different opinions. .

HINTS ON THE ART OF QUESTIONING

- Do not permit group answers.
- Encourage complete and clearly expressed answers.
- Do not permit a few to answer all the questions.

  If you find it necessary to direct a question to a particular individual, call the person by name and then state the question. It gives him a chance—it is a courteous gesture. Such direct questions should be employed only infrequently.

- After you address a question to the conference as a whole, pause. If there is no response, you may say, "Mr. Paul, you have had 15 years of experience in the mechanical department—may we have your opinion?

- Questions that produce a "yes" or "no" answer should be followed by asking the conferee his reason for the "yes" or "no." WHAT, WHY, WHEN, WHERE, WHO, WHICH and HOW questions cannot be answered by "yes" or "no."

- "What do you think?" is simple and good, but caution should be used regarding its over-use.

- The main idea of a conference is to stimulate and reveal the conferees' thought processes.

questions in lieu of statements

In cleverly following his role as mediator rather than participant, the leader can make use of questions in another fashion. There are a number of situations that may arise which call for some positive guidance on his part, but if that guidance becomes control or dictation, he will reduce his effectiveness. In lieu of a direct statement, then, the leader can achieve the same result by indirection, can phrase his ideas in the form of a question and thus make more subtle and ingratiating his guidance of the discussions. Some examples of this type of question follow:

1. To call attention to a point that has not been considered:
   "What has been your thinking about this part of the problem?"

2. To ask how strong an argument is:
   "How much importance do you think we should attach to this statement?"

3. To get back to causes:
   "Why does Mr. X oppose this measure?"

4. To call attention to the source of information or argument?
   "Where did this information originate?"
   "Who is the Mr. X that was quoted a while ago?"
   "What opportunity did Mr. X have to know about the subject?"
5. To suggest that the discussion is wandering from the point:
   "Just what point are we now considering?"
6. To suggest that all available information on a point has been given:
   "What information can you give us on this point in addition to what has already been given?
7. To call attention to unsuspected difficulties or complexities in the problem:
   "How much more complex is the problem than we had at first supposed?"
   "How does this help us to understand why supervisors find it so hard to solve this problem?"
8. To register steps of agreement:
   "To what extent do we agree on the point?"
9. To call attention to points of disagreement:
   "On which points in this discussion do we disagree?"
10. To suggest that the group is not ready to take action:
    "How do you feel about thinking this matter over and reconsidering it at our next meeting?"
11. To suggest that nothing will be gained by further delay:
    "After all, what new information or ideas can we hope to get? What is to be gained by further delay?"
12. To suggest that personalities should be avoided:
    "How much more important is the solution of the problem than the people involved?"
13. To suggest that some people are talking too much:
    "How can we give more people a chance to speak in these discussions?"
14. To suggest that each opposing group might well come part way in arriving at a course of action:
    "Where, between these two points of view, does the best course of action lie?"
15. To suggest that the group may be prejudiced:
    "How is our own interest in the outcome causing us to overlook the interest of other groups of supervisors?"
16. To bring out an idea that has not been covered:
    "Have you considered this idea?"

KEY WORDS FOR QUESTIONS

CLASSIFY	Demands the assembling, arranging, distributing, and grouping of facts according to some common characteristic.
COMPARE	Requires the detection of resemblance and difference among facts.
CRITICIZE	Exacts good judgment, and a careful analysis of a subject.
DEFINE	Necessitates the determination of boundaries or limits to a subject and the fixing of a clear meaning.
DESCRIBE	Calls for the selection and portrayal of the features or qualities which characterize a subject.
DISCUSS	Compels a minute examination of a subject presenting pro and con considerations and adducing arguments in supporting a position.
EXPLAIN	Makes necessary a clarification of any points which may obscure a subject.
ILLUSTRATE	Calls for examples that will explain or clear up the subject under consideration.
INTERPRET	Necessitates bringing out the meaning of a subject in the light of an individual's belief or judgment.
JUSTIFY	Demands showing that a thing is reasonable or warranted.
OUTLINE	Makes necessary the sketching or indicating of main points.
REVIEW	Compels going over a subject deliberately and giving it a critical examination.
SUMMARIZE	Asks for the presentation of a subject in a concise and compact manner.
TRACE	Requires following in detail the development or progress of some subject.
VERIFY	Exacts proof that a thing is true.

summary of the use of questions

To assist the leader in acquiring a thorough mastery and working knowledge of the different types of questions, the following characteristics are offered:

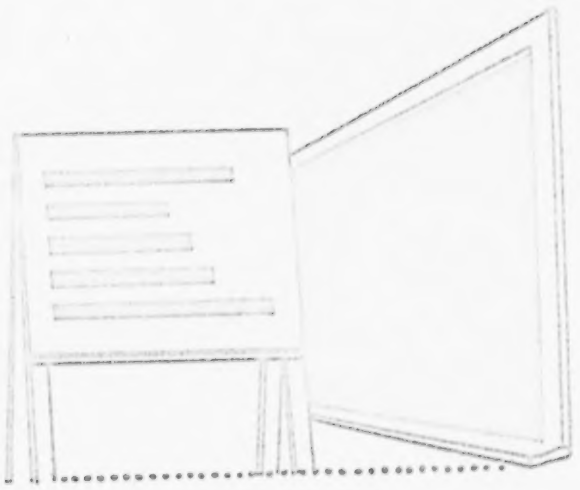
1. All questions should be answerable. It is unwise to ask questions to bring out the conferees' ignorance.
2. Every question should presuppose a previous experience that will enable the conferee to answer.
3. It should be clearly worded. The conferees must not be left in doubt as to what is wanted.

4. The question must not be so easy as to encourage slovenly thinking, nor so difficult as to discourage effort. It must be thought-provoking.

5. The question must be asked in a natural business-like manner with a tone which indicates confidence in the conferees' ability to answer it.

6. It should be asked with a definite purpose in mind.
   (a) To seek information
   (b) To emphasize some point
   (c) To stimulate thinking sufficient to arouse discussion.

7. A discussion question should be well balanced. That is, emphasis should not favor any one of a number of persons, things or conditions.



chapter 6

chart work

- Charting and Prepared Charts
- Charting a Conference
- Charting Technique
- How to Use Charts
- Prepared Charts
- The Use of Prepared Charts

charting and prepared charts

As used in this chapter, *charting* refers to the technique of recording significant points in a conference in such a fashion that they are visible to all. It refers to charts built up in the course of a discussion rather than those prepared beforehand and used as an illustration by the leader.

Prepared charts are those which have been worked up beforehand for presentation to the group in connection with some phase of the subject matter involved.

charting a conference

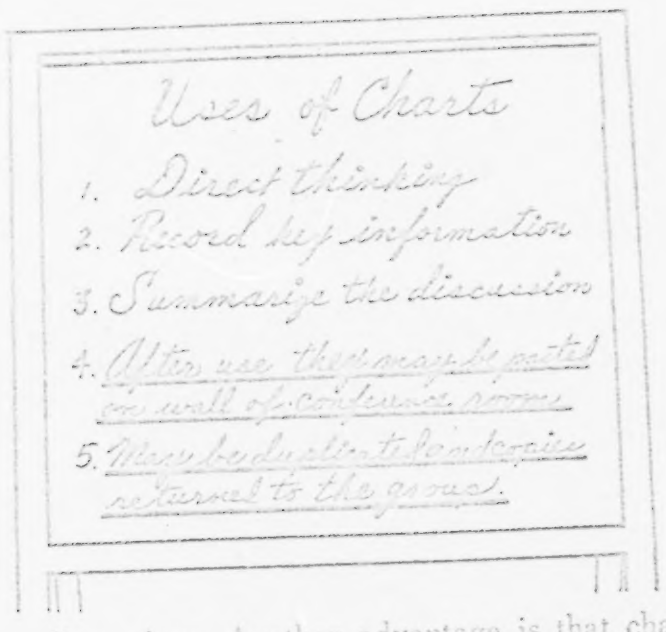
It is difficult to conceive of a conference that cannot be made more effective by recording its high points on chart paper or blackboard. The value of this procedure derives from several sources:

1. Chart headings serve to direct thinking.
2. The entire chart serves to record the highlights of the discussion.
3. The organization of chart entries assists in logical thinking.

Things we can see make a lasting impression on our minds. People are visual-minded. Outlining discussion on a blackboard permits the conference leader to arrange ideas presented by the group in such a manner that the conferee is stimulated to greater thinking. More accurate thinking is promoted because previous contributions and conclusions are listed, lessening the chance of forming wrong conclusions and forgetting important facts. From the standpoint of the conferee it gives him a feeling of importance to see his contribution appear before the group and serves as an incentive for more active participation.

During the war newspapers carried a picture taken in the North African desert just prior to the campaign in which the British Eighth Army broke the power of the Africa Corps and drove the retreating Germans into Tunis and Bizerte. It showed General Montgomery surrounded by a group of officers to whom he was explaining a detail of the plan of attack they were to follow. The General, right in the front lines, was using a large portable blackboard.

The use of paper charts, though, is preferred to blackboard charting for most conferences. When paper charts are used, they can be tacked or taped to walls of the conference room, and thus serve to provide a visual record of the high points of the conference. They can be referred to as the discussion progresses; to review, to keep the group on the subject, to point out the continuity of the conference. Also each discussion will be interrelated with other discussions. This relationship may be established in the minds of the group by reference to previous discussions, and by the display of charts developed


Uses of Charts
1. Direct thinking
2. Record key information
3. Summarize the discussion
4. After use they may be posted on wall of conference room
5. May be duplicated for interim or final return to the group.

during those discussions. Another advantage is that charts may be duplicated and copies returned to the group members. For most effective use, charts should be approximately 32" x 42".

charting technique

Chartwork is the most flexible instrument a conference leader has for conveying ideas. As a discussion aid it is practically indispensable. But a certain degree of skill must be developed or the results are likely to be disappointing. A consideration of the general principles which underlie good charting work together with a little common sense in their application will increase the effectiveness of any conference leader.

The very first thing that the leader should do in conducting a dis-

cussion is to write across the top of the chart or blackboard the subject to be discussed. There is something about putting the subject in front of the group which helps to keep the minds of the conferees concentrated on it. The conference leader can point to the subject and call members back to a consideration of it when the discussion tends to wander.

Charting technique may also be used for the following purposes:

To chart—

(1) Points in the discussion.
(2) Strange and new terms.
(3) Summaries, outlines and key points of a discussion.
(4) Advantages and disadvantages; pro and con statements, causes, remedies, results, etc.

To illustrate—

(1) Diagrams.
(2) Graphs.

Charting is a one-man job. If it is poorly done, if it is confused and inaccurate, if it is lacking in sharpness and emphasis, there is only one man to blame. The leader should get into the habit of being as critical of his own charting as he is of the charts and films supplied him by others. Skill in its use is important. No other aid allows the leader so much opportunity to give free play to his ingenuity. No other aid can do so much to help him solve problems. Not until he has learned to use it effectively will his work take on the sureness and certainty that is characteristic of the skilled worker.

How to use charts

The conference leader should plan his chart work. He should consider carefully:

¶ What parts of the conference discussion are important enough to emphasize by charting them?

¶ What can be done to get the difficult points of this discussion across?

¶ How can charting be used to help conferees clarify their thinking?

¶ Will any of this chart work take too much time? Would it be better to have it mimeographed? Should it be charted before the conference starts?

¶ What will this material look like when it is charted? Is there any of it which should be left there for the entire conference? On which part of the chart or blackboard should each of these items be placed? Will they stand in some logical relationship to each other?

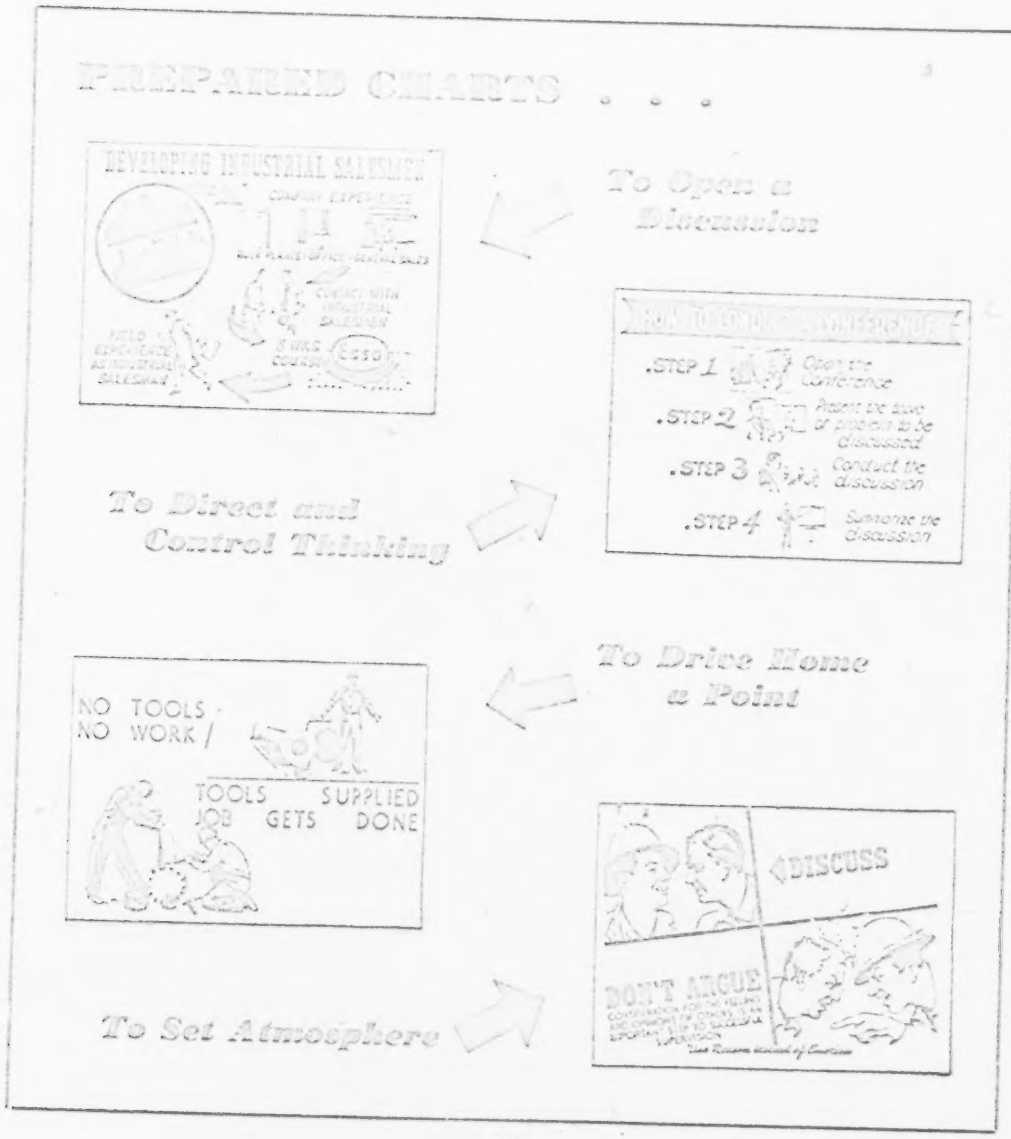
"COMMUNICATION BY CHARTING"

1. Try out charts before the conference. Do it either on an actual blackboard or on chart paper.
2. Arrange the group so that no one has difficulty reading the chart. Be careful of blind spots caused by glare.
3. Pay attention to neatness and attractive composition.
4. Plan charts so different ideas stand in some logical relationship to each other.
5. Avoid using unnecessary words. If the meaning is clear, a phrase is better than a sentence; a word is better than a phrase.
6. Use words and terms familiar to the group.
7. Write, print, or draw legibly. A little practice can do a great deal to improve both quality and speed.
8. Draw or write quickly so that interest will not lag.
9. Chart responses promptly—it encourages participation.
10. Use a pointer when explaining in order to give the group a more unobstructed view.
11. Make sure the conferees have had sufficient opportunity to copy drawings and other material into their notes.
12. Erase or remove materials no longer in use.

Avoid talking to the blackboard or chart to such an extent that group contact is lost. It is practically impossible for a leader to make any extended use of the blackboard or chart without occasionally talking in its direction. There is nothing wrong with this. There is, however, something very definitely wrong with the leader who becomes so involved in putting up his material that he turns his back upon the group and seems to forget that it exists. Because he is no longer looking at the men he is unable to notice the effect his words are having upon them. His voice drops to a low monotone and very soon he is talking only to himself. The conference leader should recognize the fact that in most cases a man who talks to the blackboard does so because he has not planned his material to the point that he is absolutely sure of what comes next. He has to do his planning as he goes along. He concentrates on his work in order to avoid making an error. The results are always the same. He becomes difficult to hear and difficult to follow. The conferees rapidly become interested in other things.

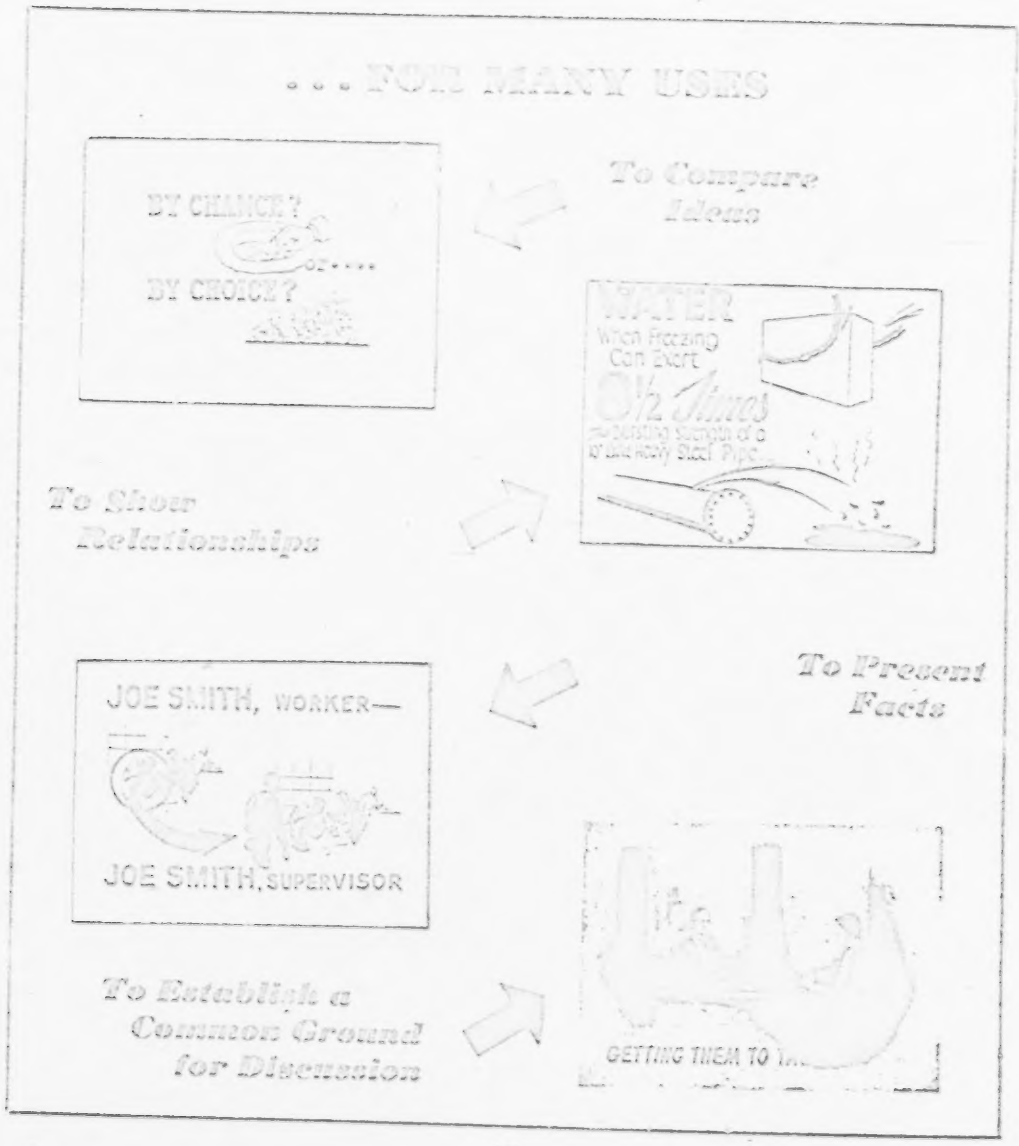
prepared charts

These aids, including graphs, diagrams and other types, may be elaborate or simple, depending on the resourcefulness of the conference leader and the means available for producing them. They take a wide variety of forms. The graph originated more particularly in scientific and engineering work and, in general, visually represents changes in value of one variable according to changes in a second variable. The term diagram may represent almost any kind of data or information in the form of tables, pictorial representations, or other devices which appeal to the eye. An example would be a flow diagram showing the routing of an order through the purchasing department. Also, if it were desirable to evaluate the relative impor-


PREPARED CHARTS . . .
DEVELOPING INDUSTRIAL SALESMEN
To Open a Discussion
To Direct and Control Thinking
.STEP 1 Open the conference
.STEP 2 Assist the type of problem to be discussed
.STEP 3 Conduct the discussion
.STEP 4 Summarize the discussion
To Drive Home a Point
NO TOOLS NO WORK!
TOOLS SUPPLIED JOB GETS DONE
DISCUSS
DON'T ARGUE
To Set Atmosphere

tance of a number of job responsibilities, that relationship could readily be presented by diagrams. There are also many forms of organization and progress and flow charts. These devices are excellent methods for the presentation of cases.

All of these devices are most useful where the situation calls for visualizing relationships or securing an accurate picture of a situation. The great advantage of these devices is that they present a great deal of information in such a way that its significance can be understood readily. That they appeal to the eye, rather than to the ear, is an advantage since it is very difficult for the mind to follow a number of inter-relations when expressed in words.



Use of prepared charts

The following points are important in the use of prepared charts:

¶ Be thoroughly familiar with your charts—what they mean, where they fit, how they should be introduced.

¶ Do not read them—tell the story behind the chart in your own words.

¶ Don't introduce every chart in the same way—make each approach different.

¶ Explain their meaning. Tell what they show, their meaning and why they are shown. In the case of the diagrams explain them carefully. Don't assume that everyone should understand a chart no matter how simple it might appear to you.

¶ Be sure everyone can see them—plenty of light on the charts; no shadows or glare.

¶ Keep each chart covered when it is not in use and get it out of the way as soon as it has served its purpose.

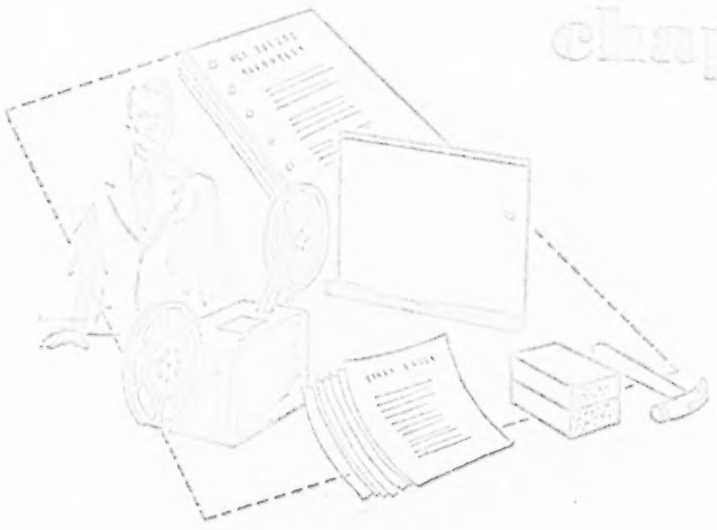
¶ Practice using them.

¶ Timing is important, introduce each chart at the proper time.

¶ In preparing charts, keep them as simple as possible. Be sure that writing is readable from every part of the room. Don't crowd too much information on one chart.

¶ Don't stand in front of the charts when you use them—keep to one side so they are visible from every part of the room.

chapter 7



other devices used by the conference leader

- Films
- Case Studies
- The Guest Speaker
- Pro and Con Analysis
- Examples
- Rephrasing
- Conference Summary
- The Psychology of Conference Devices

A film can be a very effective aid in conference leading, as it can in any type of training. But it should be recognized as such—an aid—not something that can take the place of the conference leader nor make his leadership job easier.

It has been estimated that films will do a number of things; increase interest as much as 40 per cent, make a subject 25 per cent more understandable, reduce learning time by 25 per cent, and add to the amount of learning that can be retained for a year by approximately 35 per cent. Like a precision tool, however, films will not realize these or any other advantages unless they are used with a skilled hand. The conference leader must spend a lot of time and thought on the careful planning of the use of films, and he must be prepared to supplement the actual showing with introductory and summarizing discussions.

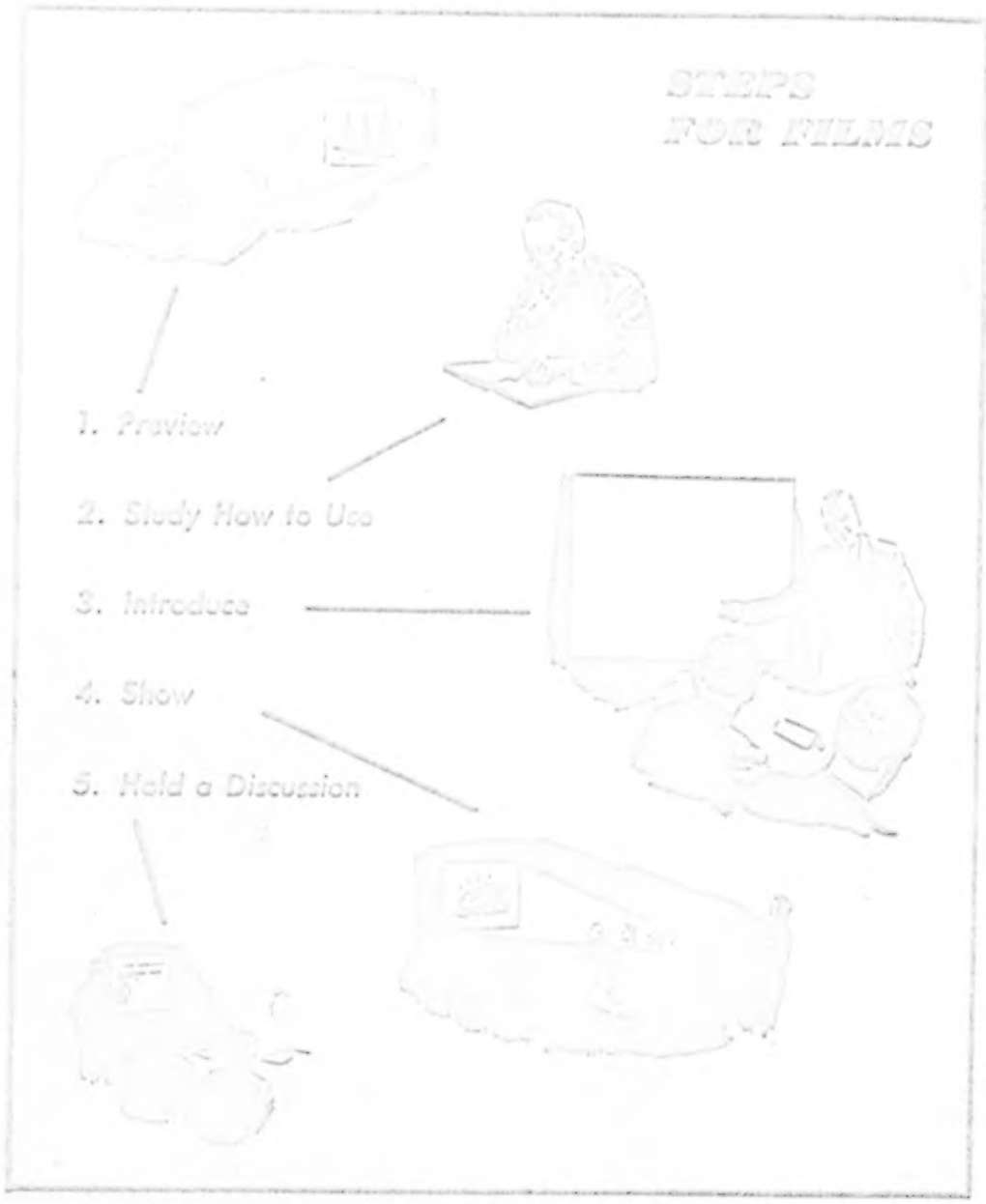
Films must be of the right type to serve as a training aid. Those designed on the "we know it all" or "here's how to do it" basis are not suitable for training. The best training films present ideas or principles for consideration.

PURPOSES OF FILMS:

1. To start group thinking along desired lines.
2. To focus attention on a point or principle.
3. To hit the high points of a detailed subject.
4. To close or summarize a conference.
5. To crystallize group thinking.

The following simple rules are presented to guide conference leaders in the effective utilization of films.

1. Remember that the film is an aid or supplement—it will never do an entire teaching job.
2. Pay attention to the condition of the room with respect to darkness, ventilation, noise distraction, and seating arrangement. Be sure everyone has a full view of the screen from a comfortable angle.
3. Delegate the handling of the projector to someone else, wherever possible, so that you can be free to concentrate upon the discussion and point out important parts of the film.
4. Know your film before you show it, review it carefully to determine its scope, approach, and its relationship to the subject matter of the conference.
5. Decide what you want the group to get out of the showing.
6. Plan how you will introduce the film, being certain to consider what the film is about and why you are showing it.



7. An important part of film technique is to stimulate the group to think about the film's content before they see it. One way that this can be accomplished is to ask questions of obvious interest, the answers to which most of the audience do not know. Questions involving problems with which the group is faced are especially helpful. If the film then answers those questions, its teaching quality will have been greatly improved by the advance stimulation. It will have the additional effect of increasing future receptivity to films by making everyone aware of what they have learned from the film.

CHECK LIST FOR USING FILMS

If you can't say yes to all these questions, don't use the film.

1. Do you know what purpose will be served by the film?	Yes ☐	No ☐
2. Is the film appropriate to the topic under discussion?	Yes ☐	No ☐
3. Are you thoroughly familiar with the film? Have you previewed it?	Yes ☐	No ☐
4. Is the conference room adequately equipped for showing films?	Yes ☐	No ☐
5. Have you prepared an introduction?	Yes ☐	No ☐
6. Do you know what questions you will ask to promote discussion?	Yes ☐	No ☐
7. Have you planned a discussion to be conducted after the showing?	Yes ☐	No ☐
8. Are the contents of the film in keeping with company policy?	Yes ☐	No ☐
9. Does the information the group will get from the film justify the time taken to show and discuss it?	Yes ☐	No ☐
10. Does the film avoid imposing ideas?	Yes ☐	No ☐

8. Immediately after showing the film, discuss it with the group, bringing out the important points, asking for opinions and directing questions at the group.
9. It is sometimes advantageous to stop the film at a strategic point and develop a discussion which will arrive at conclusions. The film can then be continued, and the solution or ideas developed in the film can be contrasted with those arrived at by the audience.
10. If the group can benefit by seeing a film again, do not hesitate to repeat it.
11. In employee training, films are not used to emphasize "this is how we will do it" or "this is how it should be done." Rather they are to point out "this is how it has been done" or "this is one way it might be done." It is a case study leaving the employees free to comment, criticize, or accept the methods and policies illustrated.
12. Remember that films are a definite part of the discussion program, part of the training process. They are not to be considered as a novelty or as entertainment.

case studies

The average employee prides himself on being practical. He feels that he deals in tangible things and that he meets his problems "on the spot." He is faced with many problems, each one of them different, and for the most part he must work out his own solutions. He is keenly interested in the actual problems of other employees, particularly if they are similar to those which he has experienced.

Because of these conditions, theoretical discussions are of limited value in a conference; it is difficult for the leader to arouse interest in subjects that cannot be directly and practically related to each employee's own job. If, however, the conference leader can draw cases from actual experience, either his own or others, he will provide the common ground and the critical appreciation necessary to stimulate discussion. Practical case studies will induce thinking, analysis, pro and con discussion, and genuine efforts to find a solution among a typical group of employees. They should be written and studied carefully in advance to make sure they are complete and worthwhile.

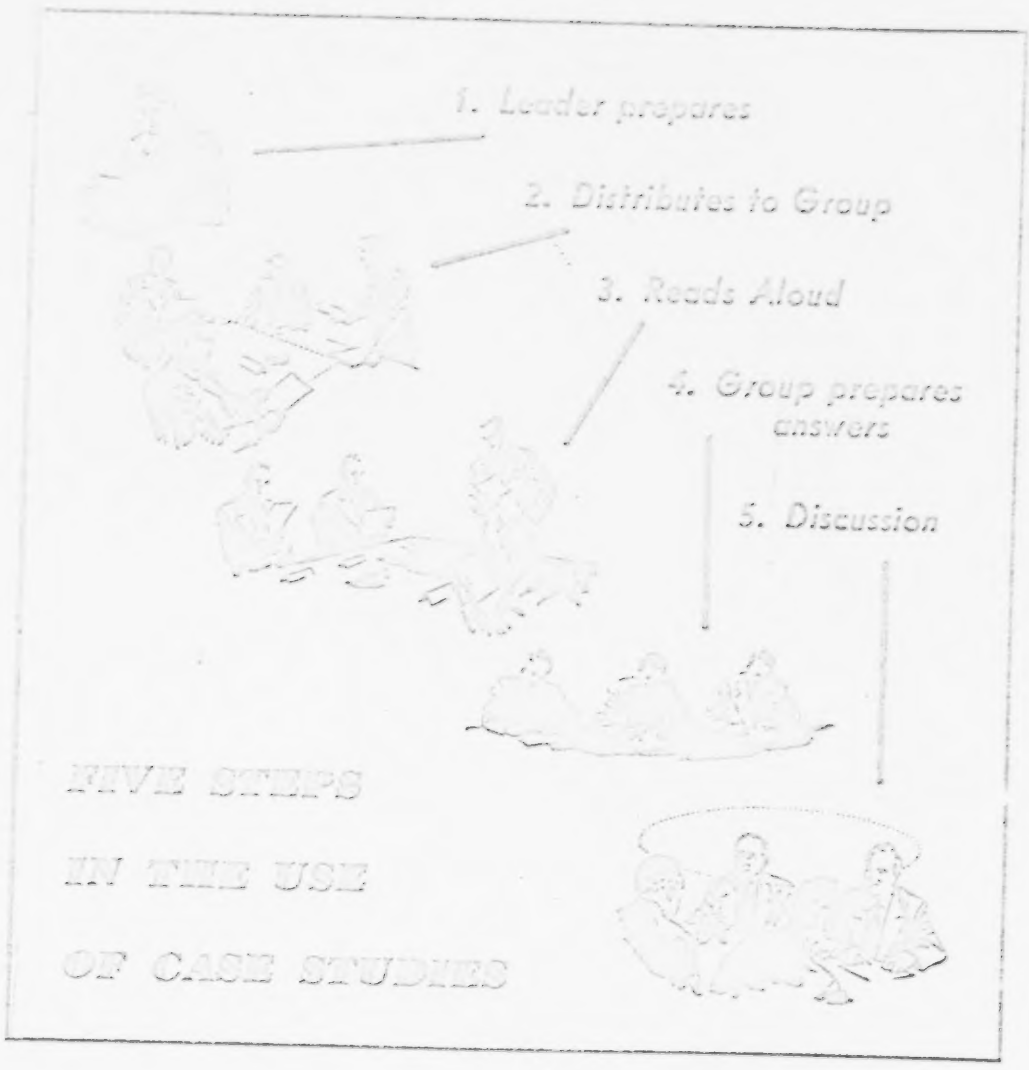
Cases may be used for a variety of purposes in the course of a conference; to get the group discussion started, to emphasize the importance of a particular technique, to compare one method with another, or as a parting shot, to give the employee something to think about when he leaves the conference.

The subject matter of case studies may be drawn from operation or maintenance difficulties, sales or production problems, accidents, variations from standard of performance, day to day contacts with workers, human and mechanical deficiencies, and a great number of other sources of which the foregoing are typical.

As a rule, cases should focus attention on a problem, giving facts and results. They should not suggest right or wrong answers to questions which may arise, nor should they attempt to establish rules or principles for solving similar problems. It is left to the conferees to analyze the factors involved, place blame or responsibility, determine the value of various methods and policies and otherwise place their own interpretations on the facts as presented.

Best results have been obtained when the conference leader has prepared question sheets to guide the employee in his analysis of the facts. As the conference takes up the various points of issue presented by the case, the leader can profitably tabulate conclusions on the blackboard, providing a record of the group opinion.

There are some risks in the use of case studies that should be clearly understood and considered by conference leaders. When actual plant cases are used, personalities may be involved which may



result in unfavorable reactions. People in the group or known to the group can be "framed" or "put on the spot." Good judgment, tact and common sense must be used in the presentation of all of these types of cases. Also, the discussion may involve serious conflicts with established policies, or the solution may be a prerogative of top management rather than the conference group.

The leader should provide sufficient background information on the case so that the problem is clearly understood by all. He should read the case himself, experience having shown that cases read by members of the group are often poorly read, with the result that the whole point of the case may be lost. The leader should guide the discussion carefully using his question sheet as a basis, and should be careful to terminate conversation when a solution has been reached, or it is demonstrated that further talk on the point would be a waste of time.

WHAT WOULD YOU HAVE DONE?

(A Sample Case-Study Prepared For Group Use)

A pipefitter reporting for work at 7:45 A.M. was assigned to a small repair job which would take about two hours to complete. After carrying his tools to the job and obtaining the necessary materials, his supervisor told him to move to another job at about 9:00 A.M. Before he could complete this second job he was told by his supervisor to start another job of more importance. He refused to start the third job and after some argument was finally allowed to complete the job he was doing.

All of this maneuvering was caused by the fact that the general foreman had made several changes in the priorities of the three jobs and couldn't decide which was more important, although he was aware of all three of the jobs one day before this situation occurred. The pipefitter involved was a veteran of almost thirty years experience and enjoyed an excellent reputation as a mechanic.

Note: The following may be questions the leader alone uses or, for variety, they may be mimeographed with the case and filled in by the men prior to starting the discussion.

The following statements apply to this situation. Read each one carefully. If you agree, put a circle around "yes." If you disagree, put a circle around "no." If you are in doubt, circle the "?."

1. The pipefitter should have been disciplined for refusing to do the third job.	YES	?	NO
2. The pipefitter foreman was at fault in this case.	YES	?	NO
3. The general foreman could have prevented this situation by establishing a priority for each job sufficiently in advance to permit the assignment of mechanics.	YES	?	NO
4. The general foreman had failed to evaluate the situation adequately.	YES	?	NO
5. The pipefitter showed very little respect for his foreman when he refused to do the job.	YES	?	NO
6. This kind of supervision shows a lack of cost-consciousness as it has resulted in lost time, wasted material, and disgruntled employees.	YES	?	NO
7. There is evidence of poor planning in this case.	YES	?	NO

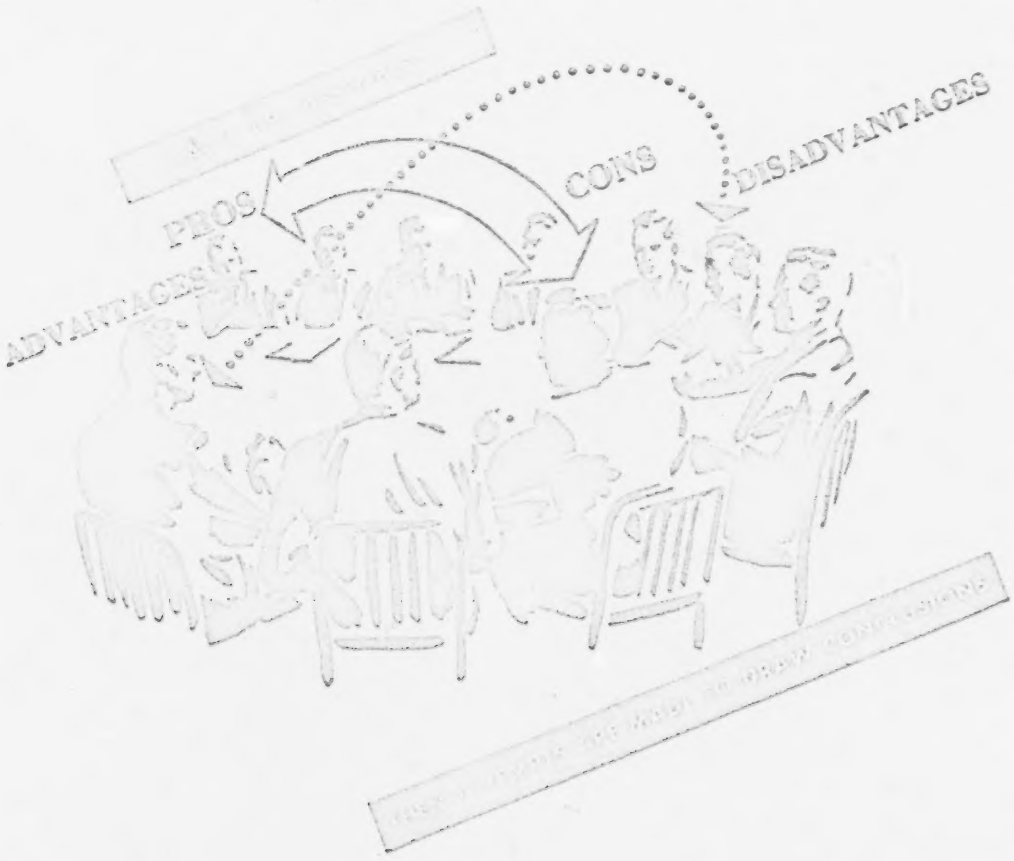
the guest speaker

Occasional use of a guest speaker who will give a short talk on a problem facing the group is an effective device for maintaining interest and promoting group participation. The talk should be limited to a maximum of thirty minutes, followed by group discussion.

pro and con analysis

The pro and con analysis is intended to give a list of the reasons for and against a certain decision or a proposed plan of action. An example is a listing of the reasons for and against establishing a full-time training program, or for training of specialists as opposed to training of all-purpose men. It is used to correct faulty thinking, to force an impartial consideration of the problem, and to give practice in analytical thinking. This device makes use of the psychological fact that most opinions are biased because people reach conclusions on the basis of limited experience or act upon information insufficient to enable reaching an unbiased conclusion.

Another variation is getting a group vote on questions from a case study then using the ones where differences of opinion exist for further discussion.



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examples

Calling for examples to illustrate points under discussion is another means of maintaining interest and stimulating thinking and discussion. It serves the purpose of making the discussion real or practical.

Examples may come from the conferees or from the leader. When the leader offers an example, he should have in mind one of two purposes: (1) as a "pump primer" to stimulate other examples or (2) to illustrate clearly the point under consideration. When the leader gives an example, it may be better for him to indicate that it is one furnished by some other employee rather than one from his own experience.

When there is some doubt about the meaning of an idea which has been expressed by a conferee it is good practice to ask, "Will you give us an example of what you mean?" or "Will you tell us just how it works in your department?"

rephrasing

Since the members of the group during any particular discussion are in the stage of trying to organize their thinking, it frequently happens that their choice of terms may not express their ideas clearly and briefly. It is the leader's privilege, when he has grasped the idea, to rephrase it for brevity and clarity. He is not justified, however, in using this technique as a means of introducing ideas not suggested by the group members. *Nor does it mean that he should rephrase every statement made by conferees.*

conference summary

Every conference discussion should be properly summarized and the high spots indicated. Conclusions should be arrived at and their application considered. Failure to do this raises in the minds of conferees a question as to the value of the conferences. The conferee is interested in worthwhile ideas and information that he can put into practice. In the summary the conference leader recharts, restates, and reviews outstanding developments, thoughts, and worthwhile decisions arrived at by the group. At this time he should also stress the importance of putting these conclusions into practice wherever and as soon as possible.

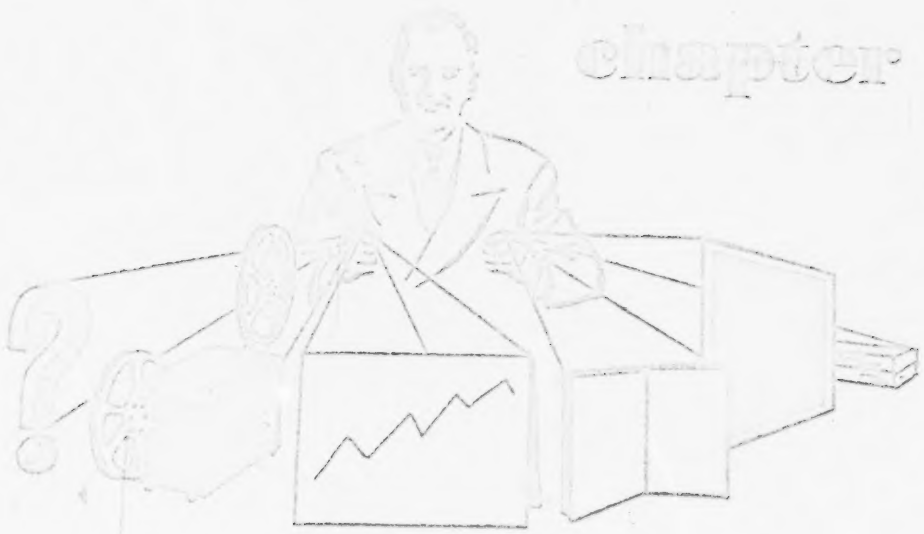
the psychology of conference devices

These devices are effective because in the first place, people think more easily with concrete materials; in the second place, they often need a guide to get their thinking in motion; and in the third place, given a start, they can work under their own power.

DEVICES USED BY THE CONFERENCE LEADER

What? How?	*Why? Where? When?*
1. Questions (a) Direct (b) Overhead	The right question, properly worded, is the most powerful tool used by conference leaders. Used to stimulate thinking and bring out facts.
2. Charts (a) Developed during conference. (b) Prepared Beforehand	Used to direct thinking, open a discussion, drive home a point, summarize, make a comparison, or keep ideas before the group.
3. Films	A starting point for discussion, used to clarify an idea, establish basic principles, or summarize.
4. Case Studies (a) Verbal (b) Written	A device for promoting discussion, bringing out facts, analysis of policies and procedures.
5. Illustrations, Graphs, Diagrams	Used to clarify a point, get attention, clinch an argument, visualize relationships and differences.
6. Anecdotes and Stories	Should be used only when they apply. Off-color stories often do more harm than good. Can be used to break monotony, illustrate a point, get attention, or to break away from a delicate situation.
7. Throwing questions back to the group.	To develop greater conferee participation, to keep the leader's contributions to a minimum.
8. Rephrasing Conferees' statements.	To clarify thinking, conserve chart space or to get group agreement.
9. Deliberate misinterpretation of conferee's remarks.	Forces member to defend his point of view. Often it draws a comment from a shy member. Can be used as a "squeeze play" on an unattentive member.
10. Numbering items out of order. 1-2-4-5-6	Immediately brings a reaction and often gets comment from one who has not said a thing previously. Focuses attention.

chapter 6



the leader's part in a conference—a summary

- Importance of the Leader
- Do's for Conference Leaders
- How to Get Ready to Lead a Conference
- How to Lead a Conference
- Handling Difficult Situations
- Conference Leader's Self-Rating Scale

Importance of the leader

In the conduct of a conference, the leader must not feel that he is merely a chairman carrying out a set program that has been arranged by someone else. Upon his own ability to lead the discussion, more than upon any other factor, will depend the success or failure of the meeting.

A good conference leader can hold an interesting, worthwhile discussion with a mediocre outline and little material, but a poor leader can be boring with the best material and a fine working outline.

The importance of the job done by the conference leader cannot be emphasized too strongly. The reactions of the supervisors to the whole program and their participation in future conferences will depend upon the quality of his work.

The conference leader should make it a practice to get to all conferences ahead of time and have everything ready. He should observe the adage "Practice what you preach." For instance, he should comply with the four steps which he asks supervisors to use in instructing. If he advocates certain principles of management, as he will in conferences dealing with job management, he should put them into practice in the conduct of his conferences. The same policy should be followed with respect to the principles recommended for handling workers.

do's for conference leaders

1. *Make a Good Beginning.*

   Choose opening statements carefully; be sure they fit the group and local situation. Make them short.

2. *Remember, Good Discussion Means Participation.*

   Emphasize the fact that everyone is invited to take part. All should have an equal opportunity to participate. Recognize the person who hasn't talked in preference to the one who has.

   Try to catch any contribution from a conferee, no matter how poorly expressed. Many times people are thinking when they aren't talking.

   Don't worry about a lull in the discussion. Thinking is a slow and difficult process to many people. Don't rush them.

3. *Use Good Questions.*

   Plan your questions carefully. Good conference leadership and ability to ask good questions go together.

   Avoid directing *all* questions to the group at large. Occasionally a question should be directed to a conferee who has had little or no part in the discussion. Ask thought-provoking questions. Negatively phrased questions are sometimes effec-

1. *Make a Good Beginning*

2. *Good Discussion Means Participation*

3. *Use Good Questions*

4. *Good Discussion Should Be Progressive*

5. *Maintain Control over the Conference*

6. *Develop Sportsmanship*

7. *Avoid "Exporting" of Ideas and Opinions*

8. *Make a Good Ending*

tive in arousing discussion. Questions which can be answered by "yes" or "no" should be avoided. The discussion should never develop into a question-and-answer session.

4. *Good Discussion Should Be Progressive.*

In each conference there are objectives to be attained. The conference leader should keep the discussion on the topic and should direct it towards the attainment of its objectives. An occasional side-track is permissible but don't get completely off the subject.

Different points of view should be presented. If certain phrases are being neglected, point them out. Discussion should not be one-sided.

Don't wear out points of discussion. If the group interest

How to
Get Ready to Lead a Conference

Step 1—Make an Outline

Determine the objectives to be attained.
Prepare a detailed outline of topics to be discussed.
List points to be stressed or emphasized.

Step 2—Plan the Conference Procedure

Plan the approach to use—what to say, how to say it, how to introduce topics or ideas, how to control or encourage discussion.
Set up a schedule or time table—how long the conference should be, how much time on each topic or problem.

Step 3—Have Everything Ready

Necessary pamphlets, instructions, cases, information sheets, and materials to be used or discussed.
Charts, diagrams, graphs, posters, films, and slides to be displayed.
All required materials for demonstrations, note taking, charting.

Step 4—Arrange the Meeting Place

So everyone can see and hear;
So everyone is comfortable.
Provide sufficient chairs, table, ash-trays, adequate light and heat—a room free from noise.
Everything in accordance with good housekeeping.

in the topic has definitely died out, it should be dropped, at least for the moment, and another one taken up. Often a change of approach will revive an otherwise flat discussion.

Give an occasional summary. Be accurate. Give the high points and issues as presented in the discussion, not your own personal opinions. These summaries give conferees a chance to collect their thoughts. They are also helpful when discussion lags.

5. Maintain Control Over the Conference.

It is important that the conference lead[illegible] complete control of the meeting, without seeming to [illegible]ous. This does not mean that he should attempt to c[illegible] decisions of the meeting. Control is exercised so that [illegible]s arrived at will be unbiased and represent the thinking [illegible]e group.

How to Lead a Conference

Step 1—Open the Conference

Introductory remarks — put the group at ease — cordial greeting—appropriate story.
State the purpose of the conference—objectives to be attained.
Review the background for the conference.
Announce the problem or topic to be discussed.
Define the procedure to be followed.

Step 2—Present the Topic or Problem to Be Discussed

Open the discussion in one of the following ways:

(a) State the facts.
(b) Ask questions—overall or direct.
(c) State an opinion.
(d) Use a demonstration, case study, chart, film strip, or motion picture.

Step 3—Conduct the Discussion

Encourage participation—pooling of ideas, mutual exchange of experiences—give everyone a chance to take part.
Control discussion — avoid personal feelings resulting in arguments; prevent anyone from monopolizing the discussion.
Keep the discussion on the "beam."
Summarize frequently—analyze the progress of the discussion, restating and rephrasing opinions expressed.

Step 4—Summarize the Discussion

Indicate the highlights of the conference — evaluate ideas, opinions, suggestions, experiences.
Arrive at conclusions or solutions—what the meeting accomplished.
Decide on a plan of action — how to handle the problem; group proposals and recommendations.

Side conversations by conferees disturb the progress of the discussion and should not be allowed. Long-winded talks by conferees should be tactfully avoided. At times it may be necessary to interrupt the conferee who wants to talk himself out.

If it contributes to a better understanding of the topic, friendly arguments should not be avoided.

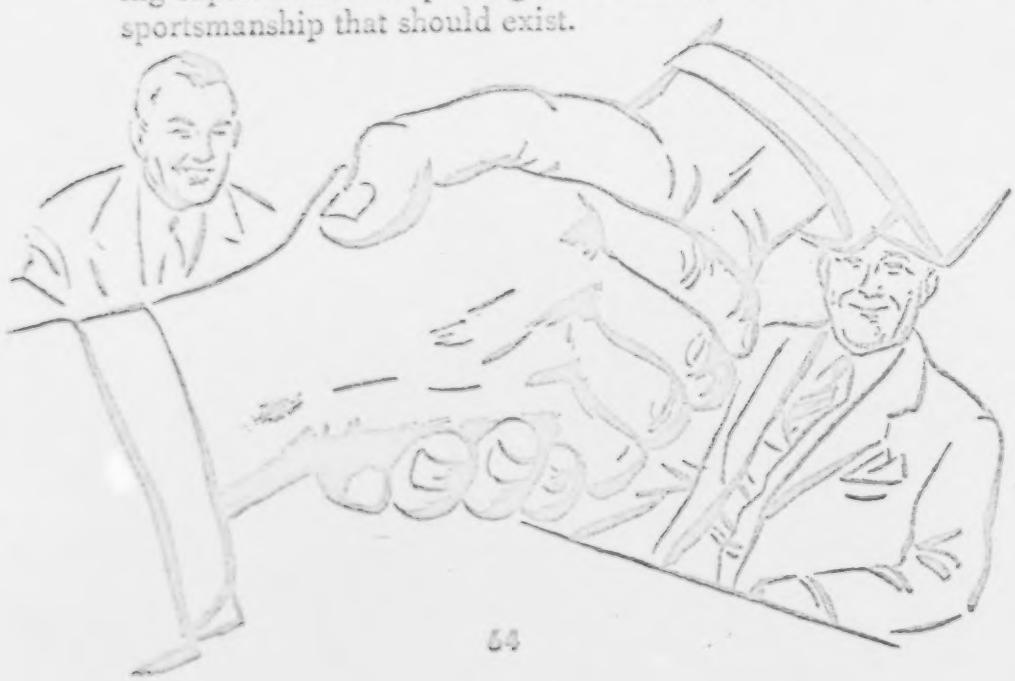
Have members speak up; nothing is more disconcerting than statements made by conferees which cannot be heard by all.

6. Develop Sportsmanship Among Conferees.

Every conferee is entitled to his own opinion, and it is the duty of the leader to make sure that everyone realizes this. Discussion may lead to disagreement, but it should be friendly disagreement.

The conference leader never takes sides in any discussion. Even if he thinks an opinion is wrong, he should guide group thinking towards correcting it, rather than correct it himself. Good humor will do much toward developing the right atmosphere for discussion. The conference leader should remember it takes time to think. He must not become impatient. He must try to keep the group from being impatient if the discussion doesn't move fast enough. Patience means waiting a reasonable length of time for response to a question or opinion. It should be remembered that time seems to pass more slowly for the leader than it does for the group.

The leader should keep always in mind the fact that no healthy result can come from a conference if it breaks up in a spirit of ill-feeling. As stated before, complete agreement on all points can hardly be expected, and it is not at all necessary. But an attitude should prevail throughout, and it is largely the leader's responsibility to promote and maintain it, that will send each conferee away from the room with a feeling of accomplishment and a sense of appreciation for the opportunity he has had to discuss his problems with others. A cordial and sincerely intended round of handshakes at the conclusion of a series of conferences, like the handshake of opposing captains after a sporting event, is a symbol of the type of sportsmanship that should exist.



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10 POINTS FOR CONFERENCE LEADERS

1. Be ready—a well-appointed conference room—no distractions.
2. Get your group interested from the start — use case studies—stories—familiar terms.
3. Have a change of pace—keep them awake.
4. Be smooth—keep the meeting moving; don't fumble.
5. Know your material—use your cases, films, and charts skillfully—practice beforehand.
6. Get the group in on the discussion—deal them in early.
7. Stay on the beam — summarize frequently — know your objective.
8. Be sure it's not a one-man show—be tactful—keep control but stay in the background.
9. Have a sense of humor and use it.
10. Leave them wanting more—end in high.

7. Avoid "Experting" of Opinions and Ideas.

The conference leader should refrain from setting himself up as an expert or final authority on any point raised. As far as possible, the group should make the decision. Even if he knows the answer, it is well for the conference leader to refrain from giving it, but rather to stimulate and direct thinking through the skillful use of questions, cases, and examples. Unanswered questions often form the basis for another discussion. Rephrasing is an important device used by the conference leader but it should not be carried to the point of attempting to change a conferee's thinking.

In restating questions or conferee contributions, try to use the same phrasing used by the conferee. If rephrasing is necessary, use the simplest words possible, and make it brief, but be sure it expresses the thought of the individual who contributed the idea.

8. Make a Good Ending.

Observe the closing time limits, but never prolong the discussion just to fill in time nor to the point where everyone is "talked out."

The conference leader should leave his group with something to think about after the conference is over.

A final summary is important and desirable. This can be done by the conference leader, or better still, it can be charted on the board with the group doing the summarizing.

Handling different situations

It would be almost impossible to list all the various situations confronting a conference leader. A few are listed here to indicate techniques and procedures which have been found to be effective.

Situations Dealing with Individuals

Situation	*Recommendation*
1. *The person who wants to impose his opinion on everyone else—the know-it-all.*	Encourage other members to comment on his remarks freely. Let the rest of the group take care of him. Build up the confidence of the group in themselves so that they will not be imposed on by this type of member.
2. *The person who wants to argue. This type is always trying to cross up the leader. He will quibble over the most trivial detail and loves to get the other fellow's goat.*	The first rule in this type of situation is to keep cool. The leader should not lose his head nor allow others to do so. Use questions. Draw out the inidividual and turn him over to the group. Give him enough rope to make some absurd, foolish, or far-fetched statements. Keep members from getting personal. Get the opinion of the majority.
3. *The person who thinks you are telling him how to run his job and resents it. This person may feel that he knows his job better than anyone else.*	Get him to feel that this experience can be valuable to others, that the purpose of the conference is to exchange ideas and to pool experiences.

Situation	*Recommendation*
4. *The over-talkative individual—the one who wants to do all the talking.*	Be very tactful but interrupt and ask others to comment. It may be necessary to ask him politely to refrain from talking and to give some one else a chance. If it cannot be done without embarrassing the individual, a private talk would be advisable. Fail to recognize him. Don't look at him when you are presenting a question. This makes it difficult for him to "get the floor." Deliberately turn to another conferee and ask for his opinion. Establish a rule that no member should speak too long on any question until everyone has had a chance to talk. Keep a response chart for a conference and show him that the others aren't getting a fair chance to express themselves.
5. *The shy individual.*	Call on him by name to give an opinion; but ask him an easy question he is sure to answer well, and then praise him. Find something for him to do to help you in the conference; for example, to hang up charts, assist in a demonstration, or make a report.

Situation	*Recommendation*
6. *The obstinate individual — has no time for school — doesn't believe in these new fangled ideas.*	Can wreck a conference if not handled properly. In a tactful way, bring the discussion to a close by calling for a vote on the question. Study the individual to determine his likes and dislikes and special interests. Try to win his personal friendship. Hold up the good points in his department to illustrate points discussed.
7. *The disinterested conferee.*	Ask direct questions affecting his work. Ask his advice pertaining to some features of the meetings. Quote tactfully some statement he has made to you outside the conference. Pick out something in his department and hold it up as a good example. Carefully bring up things in which you know he is interested.
8. *The person who attempts to get your opinion instead of giving his.*	Refer the question back to the group and then back to him.
9. *The person who carries a personal grudge.*	Avoid discussion about his pet peeve. Explain that any problem discussed must be for the greatest good to the greatest number and that no personal gripes will be discussed. If the grudge is between two individuals in the group who hold a personal grievance against each other, avoid discussion between them and reschedule one of them for another time with a different group.
10. *The person who is wrong, but whom others in the group, out of respect, refuse to correct.*	Always avoid direct criticism, sarcasm, and ridicule. Use indirect methods. Analyze a similar case without reference to him personally. Talk to him in private.

A LIST OF DON'TS

- ○ *Don't* try to dominate the thinking of members.
- ○ *Don't* twist a member's statement so badly that he can't recognize it.
- ○ *Don't* tell a member of the group that he is wrong; let the group make that decision.
- ○ *Don't* tell the members of the group that they ought to do anything.
- ○ *Don't* ask leading questions. Say: "What would happen if . . .?" or "What has been your experience?" instead of "Don't you think?"
- ○ *Don't* cover ground so fast that the members can't follow you.
- ○ *Don't* argue.
- ○ *Don't* ridicule.
- ○ *Don't* take sides.
- ○ *Don't* lecture—ask questions instead.
- ○ *Don't* talk too much.
- ○ *Don't* try to be too funny.
- ○ *Don't* set yourself up as an authority or expert.
- ○ *Don't* let anyone monopolize the discussion, including yourself.
- ○ *Don't* allow the group to waste time guessing about matters of fact.
- ○ *Don't* run overtime—start and stop on time.

Impersonal Situations

Situation	*Recommendation*
1. Handling touchy subjects.	Great tact and diplomacy must be used. Try to anticipate what controversial topics may come up and think through a plan for handling them. Avoid them if possible but face them squarely if they come up. Be neutral. Do not try to influence opinion one way or the other. Sometimes it is best to refuse to permit the subject to be discussed in the meeting. Do not promise to get action from management. Introduce a hypothetical case closely paralleling the actual situation.

Situation	*Recommendation*
2. *Establishing and holding the interest of the group.*	Avoid individual problems. Use visual aids. Use case studies and plan situations. Change the approach to the subject. Keep things moving.
3. *Keeping up with the pace of the discussion.*	Recognize voices and call on men to repeat their statements when not fully grasped by the leader. Ignore statements not pertinent to the topic. Throw a direct question at an individual.
4. *Starting a discussion when necessary.*	Take an opposite viewpoint. Use cases, real or hypothetical. Tell a story. Ask a direct question. Call for experiences, ideas, or opinions from group members, using overhead questions. Encourage a make-believe case or a real experience to stimulate discussion.
5. *Handling a request for information which is considered "confidential" or "privileged."*	Use cases real or hypothetical involving the same principles. Use good judgment and tact but refuse to be the source of such information.
6. *Request by the group to present something to management in the form of a recommendation or criticism.*	Leader should never act as the intermediary for disputes or grievances. Should be handled as a group report of recommendation and represent group thinking.
7. *To build up the discussion.*	(a) Cite specific cases that provoke discussion. (b) Secure special cases from group members. (c) Phrase questions to imply a negative viewpoint. (d) Encourage some member of the group to take issue with general trends or previous statements. (e) Take an interesting side problem to revive interest.

Situation	*Recommendation*
8. To slow down the discussion.	(a) Cite examples. (b) Tell stories. (c) Sum up opinions. (d) Ask individuals to clarify statements. (e) Ask one person for his opinion on statements made by another.
9. Preventing side-tracking.	(a) Summarize frequently. (b) Restate the problem orally. (c) Question members concerning additional phases of the problem either by direct or overhead questions. (d) Question the group as to what this discussion has to do with the problem under consideration. (e) Tell a suitable story. (f) Head off the rambler by securing a statement from a level-headed thinker. (g) Ask individuals to postpone side issues until the discussion of the specific problem has been completed.
10. Preventing side discussions between two or more conferees.	(a) Direct a question to a member of the group involved. (b) Ask men who are participating in side discussions to contribute their ideas for the benefit of the group. (c) Stop and call attention of the entire group to the side discussion.

LEADER'S SELF-RATING SCALE

For each statement below, check off in the proper column your opinion as to whether or not the point raised by the statement was accomplished. When you finish, add up your number of "Yes" answers and multiply the total by 5. If you are below 75, you are too low. If your score totals 95 or better you are excellent.

No.	Statement	Yes	No
1.	Necessary preparations for the meeting were properly handled.	☐	☐
2.	The meeting started on time.	☐	☐
3.	There was good discussion—all members participated.	☐	☐
4.	Questions were well planned, properly asked and provoked discussion.	☐	☐
5.	Discussion seemed to be spontaneous and not forced.	☐	☐
6.	Discussion was progressive; it kept on the topic and was directed towards the attainment of the objectives.	☐	☐
7.	Offering of my own personal opinions, lecturing, or domineering was avoided.	☐	☐
8.	An attempt was made to get conferees to recognize and respect the opinions of others.	☐	☐
9.	I did not take sides in any discussions.	☐	☐
10.	I refrained from answering questions, referring them back to the group.	☐	☐
11.	Exporting of opinions and ideas on my part was avoided.	☐	☐
12.	Rephrasing was used only when necessary, using the simplest words possible and being brief.	☐	☐
13.	Control over the conference was maintained at all times.	☐	☐
14.	Frequent summaries of the discussion were made to crystallize group thinking.	☐	☐
15.	A blackboard or chart sheet was used effectively.	☐	☐
16.	All essential topics or phases of the outline including application, were covered.	☐	☐
17.	Interest was maintained throughout the meeting.	☐	☐
18.	The group left with something to think about, so that thinking will continue after the conference is over.	☐	☐
19.	A final summary was made with the help of the group.	☐	☐
20.	The meeting closed on time.	☐	☐
	*Score	☐	☐

*Score = 5 x number of items marked "YES."

95—EXCELLENT
85—GOOD
Below 75—POOR

evaluating the leader

It is only natural that a conference leader should desire to know what progress he is making. To satisfy this desire a check list has been prepared to give an efficient evaluation of a leader's performance.

Who evaluates the leader?

Because the leader is too busy with the details of leadership it is impossible for him to observe his own performance in detail. It is necessary that the service of a conference critic be utilized. It is commonly accepted that the good leader and good critic can be one and the same individual, performing in one instance as a leader and in another as a critic. The check list then produces a two-fold purpose: (a) to evaluate the leader's performance and (b) to train conference critics.

In the development of the evaluation sheet, the Introduction, the Leader, the Conference, Charts, and Room Conditions were determined to be the basic components of a conference. Each of these is further broken down into its major factors. To simplify the development of a qualifying score, each factor has been given a predetermined weight, varying in value from 0 to 4 depending on the importance of the factor to the conference. Emphasis is placed on the location and not the number of check marks. Weights are indicated on the check sheet. After practice or master conferences, each conferee will fill out the sheet, and a brief discussion will be conducted on the conference. So that a score can be developed, all sheets should then be turned over to the person in charge.

The evaluation sheet is on the following pages.

EVALUATION SHEET

Conference Leader_____ Date_____

Topic_____ Evaluated by_____

Place a check (✓) in the blank space opposite each point in which you feel the leader appeared to be definitely lax or in which he revealed a weakness. (While more than one weakness may be indicated in a statement, the presence of any one in the leader's work is reason enough for checking that statement.)

A. THE INTRODUCTION

(1) Inadequate introduction to topic; group did not understand. 1_____

(2) Lecture type of introduction too long, stilted, biased. 2_____

(3) Conference was not aware of a real problem to be solved. 3_____

B. THE LEADER

(4) Leader nervous, erratic, or ill-at-ease. 4_____

(5) Referred too much to notes or manual. 5_____

(6) Apparently ignorant of topic; unprepared, no planning. 6_____

(7) Lectured or expressed own opinions too much. 7_____

(8) Leader lacked zest, enthusiasm and humor. 8_____

(9) Slow to grasp and develop pertinent points offered. 9_____

(10) Leader's vocabulary inadequate for group. 10_____

(11) Sarcasm over-use of pet phrases. 11_____

(12) Leader too talkative (wordy, not condensed). 12_____

(13) Poor tone or modulation of voice. 13_____

(14) Kept group too long after closing time. 14_____

(15) Abrupt or tactless in handling individuals. 15_____

(16) Did not announce next meeting and topic. 16_____

C. THE CONFERENCE

(17) Discussion not well distributed, monopolized by a few. 17_____

(18) Failed to arouse and/or sustain lively interest in topic. 18_____

(19) Failed to establish and clarify purpose of successive charts. 19_____

(20) Side-tracking and lack of attention not energetically checked. 20_____

(21) Permitted too much wrangling over words. 21_____

(22) Dangerous topics or offensive argument permitted to run. 22_____

(23) Too many lags in the discussion. 23_____

(24) Not much thought indicated by group in responses, a tendency to agree with others. 24_____

(25) Shortage of pertinent and interesting case material. 25_____

(26) Failed to clarify and analyze points or cases developed. 26_____

(27) Numerous questions left unanswered. 27_____

(28) Deviated too far from standard outline. 28_____

(29) Poorly framed questions not designed for timely answers. 29_____

(30) Poor distribution of time among various phases of topic. 30_____

(31) Not enough ground covered in available time. 31_____

(32) Failed to draw conclusions and drive them home in closing. 32_____

(33) Failed to place charted points before group for approval. 33_____

(34) Did not secure understanding of important terms. 34_____

D. THE CHARTS

(35) Charts and spacing poorly planned and organized. 35_____

(36) Lettering not legible enough. 36_____

(37) Chart entries too long. 37_____

(38) Chart work too slow. 38_____

(39) Chart entries not sufficiently clear or precise. 39_____

(40) Abrupt or awkward transitions from one chart to another. 40_____

(41) Charts not headed in advance. 41_____

E. THE ROOM CONDITIONS

(42) Laxity in controlling seating arrangement and interruptions. 42_____

(43) Started late without good reason. 43_____

(44) Topic title not displayed. 44_____

(45) Inadequate chart (as mentioned under "D" above) facilities. 45_____

(46) Poor lighting. 46_____

F. GENERALIZATION

(47) The conference as a whole was (indicate by underscoring) excellent, 95; good, 85; average, 75; poor, 65; unsatisfactory, 55. 47_____

SCORE _____
(do not fill)

For each item checked find its *corresponding* weight from the key on the next page.

Key to point value (weight) for each item on the evaluation sheet.

1 — 4	13 — 1	25 — 4	37 — 0
2 — 2	14 — 0	26 — 3	38 — 2
3 — 3	15 — 1	27 — 2	39 — 3
4 — 2	16 — 0	28 — 3	40 — 3
5 — 1	17 — 4	29 — 4	41 — 0
6 — 4	18 — 4	30 — 2	42 — 0
7 — 4	19 — 3	31 — 2	43 — 1
8 — 2	20 — 4	32 — 3	44 — 2
9 — 3	21 — 2	33 — 4	45 — 1
10 — 2	22 — 3	34 — 1	46 — 0
11 — 1	23 — 3	35 — 1	47 —
12 — 2	24 — 2	36 — 2	

Score = (100 — Sum of weights checked 1 to 46)
+ weight underscored in 47

Example:

Suppose a person rating the work of a leader had checked the following items: 3, 4, 7, 10, 14, 18, 20, 25, 28, 32, 37, 40, 42, 44.

The point values (weights) of these items as indicated in the key to point values are: 2, 2, 4, 2, 0, 4, 4, 4, 3, 3, 0, 3, 0, 2 for a total of 33.

Suppose the rating underscored in 47 was *average* with a point value (weight) of 72.

Substitute in the formula above.

$$\text{Score} = \frac{(100 - 33) + 72}{2} = \frac{142}{2} = 71$$

Score = 71

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